Board of Trade Journal

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Light Clothing Working Party Report on Organization and Development

IMPORTANT recommendations affecting the future of the industry are contained in the Report of the Working Party for the Light Clothing Industry.* The report is unanimous, and is signed by all members without reservation or qualification.

The sittings of the Working Party were concurrent with the consideration in Parliament of the Industrial Organization and Development Bill, which actually received the Royal Assent on the day the report was signed. The Working Party were, therefore, aware of the nature of the Government proposals for the future organization and development of industry, and it is interesting to see that they regard a Development Council under the terms of the new Act as a suitable type of body to undertake the implementation of many of their principal recommendations.

Sectional Autonomy

The report, however, expresses grave doubt as to the practicability of establishing a single development council for the whole of the clothing industry, in view of the diversified interests affected and the differences between various sections of the industry, unless the scheme provides for a considerable degree of sectional autonomy within the central organization. For this reason whilst favouring the establishment of a single council, the Working Party suggest that it should comprise two separate directorates for the Light and Heavy sections respectively to whom the council should remit business appropriate to those sections.

The report attaches considerable importance to what it calls the " over-all planning " of the industry, that is to say the planning of supplies of materials, of productive capacity and output, and of marketing, without the detailed control of the activities of the individual firm. Apprehension is expressed that without such planning the present period of shortage may be succeeded by a period of over-production, with its attendant evils of lowering of quality and seasonal unemployment. The " planning " of the industry in this sense is regarded as one of the most important functions of the proposed Development Council.

As to the labour force of the industry it is the view of the Working Party that, allowing for geographical variations, the total existing labour force is probably more than sufficient to handle the volume of material supplies reaching the industry. There are special problems in various areas, for example in the Development Areas where, while there is no general shortage, much of the labour is untrained or semi-trained and not fuliy productive ; in other areas labour is unbalanced, the shortages being mainly of machinists.

Labour Problems

Hoarding of labour, i.e. the employment of a larger labour force than necessary, for the volume of production, was observed in some factories. This is attributed by the Working Party to the operation of the Utility price control system, the argument being that where the ceiling price is high the manufacturer who can make at a much lower figure is encouraged to be, at least, careless about his costs, including labour costs, because within the limits of the ceiling he is allowed not only to recover those costs but to make his " permitted " percentage profit on them.

The remedy suggested is the abandonment of the cost-plus element of control, and the substitution of a system of standard prices under which any manufacturer selling at or below the standard price would not be subject to any limitation of his profit. It is suggested that this in conjunction with a revision of ceiling prices, should result in an increasing supply of goods at prices substantially below the current utility level.

Cost-Plus System

The report consists of three main parts. Of these the first is mainly descriptive and historical, and is intended merely as a background for reading the

* Working Party Reports: Light Clothing. H.M. Stationery Office, price 1s. 6d.

Central control of overseas advertising

The C.P.V. Export Department has been built on the basic assumption that *it makes for better overseas advertising and more economical operation* if the advertising for all countries is centrally controlled, through a properly equipped British agency. Otherwise the advertiser must face the choice between building an expensive export advertising department of his own, and leaving his whole future in the hands of scattered, unproved, local agencies controlled through his local sales agent.

The advantages of central control are: direct contact between the manufacturer's H.Q. and his advertising agent; cumulative value of a world advertising policy with mutual support between markets; flexibility in swinging emphasis from one market to another; British standards of artwork, presentation and advertising technique, probably unequalled throughout the world; British standards of integrity and independence in choice of media and direction of policy; saving of currency to the British Treasury.

By a "properly equipped" agency we mean one which within its own organisation has all the necessary sources of information, practical experience of advertising overseas, facilities for creation of advertisements for all countries, ability to buy all media at sound rates in all countries. We do *not* mean one which simply splits commission with a local agency and leaves the job to it.

C.P.V. has put serious thought and effort into building such an organisation. We have created a network of correspondents and associates in each major market, who can advise on general trends and particular problems, and contact our clients' local sales agents. We have a London staff with long practical experience of overseas advertising, to contact the client's main office and control the local organisation. We have an art department which can create advertising for overseas markets of the same high standard as has given us a home reputation.

Already we are acting for our clients in 45 overseas markets.

Note.—Our Export Department is already handling, and readily undertakes, the export advertising of products handled at home by other Advertising Agencies.

Colman Prentis and Varley

Limited

34 Grosvenor Street

London W.1

Light Clothing Report—(*Continued*)

report. The second part deals with the present condition of the industry which it describes in detail under various subject headings. This part ends with a summary of the conclusions reached by the Working Party from their survey of the industry. The third part of the report contains the recommendations made by the Working Party; these are arranged under subject headings corresponding with those used in the earlier part of the report, so as to facilitate reference to and from the description of the present condition of the industry.

Apart from the occasional quotation of figures in the text of the report where needed for illustration or other purposes the report does not contain any statistical information about the industry. The main reason for this apparent omission is that the ground has, to a large extent, been covered already in the report of the Heavy Clothing Working Party, which included a statistical appendix containing much information about the whole clothing industry, the Heavy Clothing Working Party having found it to be impracticable to separate many of the published statistics into figures relating to the Heavy, Light, and other sections of the industry.

Recommendations made by the Working Party, in addition to those already mentioned, include:—

The planning of the output of the textile industries so as to secure an adequate and steady supply of materials for clothing manufacture;

The study by clothing manufacturers of modern production engineering methods in order to increase output in relation to the size of the labour force;

A system of standard contracts with wholesalers and retailers to ensure that orders and deliveries are timed to fit a regular production programme;

The clothing industry should be consulted in connection with the re-equipment of the textile industries with a view to facilitating changes of widths of cloths where economy in use would result;

The maintenance of standards of quality of materials, method of making, and size of measurements, such as are now operative under the utility scheme, as a permanent feature of the industry;

The increase of depreciation allowances for buildings plant and machinery, and the adoption of the "straight-line" system of calculating them where it is not already used;

The full enforcement of the Factories Act 1937 including the provision about cubic capacity which came into delayed operation this year;

The establishment of a Design Centre for the clothing industry;

An immediate investigation into comparative productivity in different countries by the appropriate Government departments in conjunction with the Trade Associations and the Trade Union.

The Working Party consisted of the following:—

Chairman: Mr. G. Russell Vick, K.C. (Recorder of Newcastle).

Independent members: Capt. J. Fox-Williams, M.C. (of Williams & Williams, Ltd., metal window manufacturers); Mrs. Mary Nicholson (welfare consultant).

Employer Members: Messrs. S. P. Abrams, Harry Gilbert and J. B. Rogers (Honorary officers of the United Committee of Light Clothing Associations).

Trade Union Members: Mr. Maurice Barr, Dame Anne Loughlin, D.B.E., Miss B. A. McDonald (National Union of Tailors and Garment Workers).

The terms of reference of the Working Party were:—

To examine, in relation to light clothing, the various schemes and suggestions put forward for improvements of organization, production, and distribution methods and processes in the clothing industry, including those contained in the Report of the Working Party on Heavy Clothing, and to report as to the steps which should be taken in the national interest to strengthen the light clothing section of the industry and render it more stable and more capable of meeting competition in the home and foreign markets.

Retail Prices Index

On September 16 the official index figure, which measures changes in the average level of retail prices compared with the level at the base date, June 17, 1947 (taken as 100), was 101. The corresponding figure at August 12, was 100.

The rise in the index between August 12 and September 16 was mainly due to increase in the retail prices of coal and of household soap.

HOME NEWS SECTION

Regional Organization and Sir Stafford Cripps

IT may be of use to readers of the *Board of Trade Journal* if we summarize the functions of the Minister for Economic Affairs, Sir Stafford Cripps, especially as they affect the National Production Advisory Council on Industry and the Regional Boards for Industry.

In his statement on September 30 the Prime Minister said that the duty of the new Minister would be to give his undivided attention to our economic problems at home and abroad, and that he would not have a new department of his own.

As a Minister without Portfolio, Sir Stafford Cripps will, therefore, remain free from departmental responsibilities, but will have the assistance of the existing organs of Government without any new department being built up. The Paymaster-General, Mr. H. A. Marquand, will work closely with him, and the Chief Planning Officer, Sir Edwin Plowden, will be directly responsible to him.

The Minister's authority will extend over the whole field of production and export, including production and export of foodstuffs, and jointly with the Chancellor of the Exchequer he will be responsible for matters affecting the country's balance of payments. He will, therefore, co-ordinate the whole economic programme of the Government through the various responsible departments.

As part of this arrangement Sir Stafford Cripps will have a special responsibility for the regional activities of the Government. The various departmental Regional Officers will, of course, continue to be responsible to their own departments, but the regional work of those departments on production and export matters will fall within the sphere of authority of the Minister for Economic Affairs. He has taken over from the President of the Board of Trade responsibility for the Regional Boards for Industry. It is understood that as Minister for Economic Affairs he intends to keep in close touch with their work and to see that they and their machinery are used to the fullest possible extent. Moreover the Chairmen of the Regional Boards will have the right of direct access to him.

At headquarters, the National Production Advisory Council on Industry, which sat under the Chairmanship of Sir Stafford Cripps, as President of the Board of Trade, will continue to work with him in his new capacity.

Salvage Returns in August

Waste-paper collections by Local Authorities during August amounted to 19,964 tons, a drop of 1,792 tons on the record post-war achievement of 21,756 tons in July.

The month's total of the most important items of household salvage (waste-paper, textiles, bones and kitchen waste) was, however, 388 tons above the July figure —51,526 tons, compared with 51,138.

The Champion County in the Household Waste Group in August was Midlothian (including Edinburgh) with a collection of 51·7 cwt. per 1,000 of its population. Midlothian was third in the first ten counties during July, with a collection of 48·4 cwt. per 1,000. Others in the first ten during August were :—

Position.	*County.*	*Collection per 1,000 of Population. Cwts.*
2nd	Flint	47·4
3rd	Gloucester	43·1
4th	Devon	37·5
5th	Middlesex (incl. London) ...	34·9
6th	Hereford	32·8
7th	Stirling	32·6
8th	Bedford	31·8
9th	Dumbarton (incl. Glasgow)	30·7
10th	Surrey	30·4

B.I.F. Goods Reach South Seas

THE influence of a trade fair is far wider than the immediate period of the event; especially is this true of the British Industries Fair. Support is lent to this view by recent happenings in Australia and New Zealand: in both Dominions large stores devoted their window space to goods bought at the British Industries Fair in May last.

Every group at one Brisbane exhibit bore a notice "Bought at the British Industries Fair in London, 1947," with a portion of the folder bearing the initials of B.I.F. and the key design in colour pinned at one end, or one of the cardboard B.I.F. posters. The Australian show was mostly confined to curtain nets, Madras muslins, cretonnes, floral rayon and other dress materials.

In New Zealand one of the largest stores, with branches in many towns in both North and South Islands, devoted all the eleven windows of its Wellington shop to goods bought at the B.I.F., and the key motif and colouring was embodied in the background of each window.

There were finely wrought wine sets, delicately hand-painted tea sets bearing such famous marks as Spode, Royal Crown Derby, Beswick, and Moorcroft; genuine old bleach Irish linen bedspreads in modern designs and Green Isle embroidered tea cloths and luncheon sets. Other items shown included elegant compacts and jewellery, distinctive floor coverings and hangings, gleaming silverware and, indeed, most of the articles that New Zealanders had not seen for years.

These window displays were widely advertised in the Australasian press with slogans such as "Next Thursday it's British Industries Fair week at . . ." and "For your home from the British Industries Fair." They drew large crowds who were appreciative of the quality of British goods and who were not deterred from buying by prices which in some cases were two to three hundred per cent. greater than in pre-war years.

This Dominion enterprise is a tribute to both British manufacturers and the pulling power and trade significance of the B.I.F.

26 More Clothing Coupons for Demobilized

The Board of Trade announce that a further distribution of clothing coupons for demobilized ex-Service men and women will begin on November 3, 1947 and continue to the end of May, 1948.

The distribution will be limited to ex-Service men and women who commenced "release" or "retirement" leave in the United Kingdom *between January* 1, 1946 *and June* 30, 1946 *only*. No others should apply and those now serving in H.M. Forces are not eligible.

The method of distribution of these coupons will be as before, through local Food Offices. Ex-Service men and women should take with them to the Food Office their 1947/48 Civilian Food Book together with their *numbered* release or discharge document.

Imports by Private Persons

There seems to be a widespread impression that consumer goods can readily be admitted into this country if they are purchased from abroad by private persons in the United Kingdom. This impression may have been encouraged by advertisements of such goods for sale which have been put out in this country by traders overseas.

The Board of Trade wish, therefore, to draw attention to the fact that such goods may not be imported without a licence and that licences are not normally granted for private purchases, whether intended for the purchaser's own use or not. This applies to imports from within the Sterling Area as well as from other countries.

Private individuals are therefore warned that if they send money overseas in order to buy goods, those goods are likely to be confiscated by the customs on arrival in this country. It is most improbable that the overseas salesman will agree to take the goods back or refund the money, which they will in consequence lose completely.

Volume of U.K. Imports and Exports for Third Quarter, 1947

UNITED Kingdom imports and exports in the third quarter of 1947 have now been revalued in terms of 1938 prices. The results of this revaluation*, together with comparable figures for the six preceding quarters and the year 1946 are given below and provide the basis for a quantitative analysis of our foreign trade. Last week's *Board of Trade Journal* gave a considerable amount of information about the quantities of the most important commodities imported and exported. In this article the subject is treated on broader lines, with commodity groups as the units. In particular, a table is included giving for the first time index numbers for the main groups of manufactures exported based on the fourth quarter of last year with the target figures for the middle of next year, as published (with much more detail) in the *Board of Trade Journal* for September 20.

The index numbers of average values derived from the volume calculation indicate broadly the aggregate effect of changes in prices between 1938 and the current quarter; these index numbers, however, do not necessarily reflect price movements between one quarter and the next with any accuracy since changes in the make-up of imports and exports also affect them.†

The detailed results of the revaluation for total imports and retained imports in the third quarter of 1947 are shown in the tables on pages 1881 and 1883 for each class and group distinguished in the oversea trade statistics with comparable figures for the two preceding quarters. A similar table for United Kingdom exports, on page 1884, makes comparison with the fourth quarter of 1946 and the second quarter of 1947.

Period	Trade as declared	Trade on basis of 1938 average values	Index numbers	
			Average values	Volume
	£ million	£ million	(1938=100)	
Total Imports				
1938	919·5	919·5	100	100
1946	1,297·7	613·6	210	67
1946 1st Quarter	279·0	142·1	196	62
2nd ,,	320·8	153·1	207	67
3rd ,,	328·4	156·7	208	68
4th ,,	369·1	162·0	227	70
1947 1st Quarter...	363·7	152·6	238	66
2nd ,,	455·5	173·8	262	76
3rd ,,	518·6	194·8	266	85
Retained Imports				
1938	858·0	858·0	100	100
1946	1,247·3	588·2	211	69
1946 1st Quarter...	266·5	135·6	196	63
2nd ,,	309·8	147·4	207	69
3rd ,,	315·5	150·4	209	70
4th ,,	355·2	155·2	228	72
1947 1st Quarter...	345·5	143·1	241	67
2nd ,,	437·7	165·2	265	77
3rd ,,	507·5	190·0	267	89
Exports of Imported Merchandise				
1938	61·5	61·5	100	100
1946	50·4	25·4	198	41
1946 1st Quarter...	12·5	6·5	190	43
2nd ,,	11·0	5·7	195	37
3rd ,,	12·9	6·3	204	41
4th ,,	13·9	6·8	204	44
1947 1st Quarter...	18·2	9·5	192	61
2nd ,,	17·8	8·6	208	56
3rd ,,	11·1	4·8	233	31
United Kingdom Exports				
1938	470·8	470·8	100	100
1946	911·7	466·2	196	99
1946 1st Quarter...	185·1	98·7	188	84
2nd ,,	222·0	115·4	192	98
3rd ,,	239·1	121·8	196	104
4th ,,	266·2	130·4	204	111
1947 1st Quarter...	249·7	118·3	211	101
2nd ,,	265·4	120·1	221	102
3rd ,,	302·6	134·0	226	114

* An article explaining the basis of revaluation was published in the *Board of Trade Journal* of May 4, 1946.

† For a full explanation of the difference between the index numbers of average values and the price index number of imports and exports see the *Board of Trade Journal* of April 13, 1946.

Total imports in the third quarter of 1947 were valued at £519 million, which is £63 million more than in the previous quarter and the second largest quarterly total ever recorded, the largest figure being £530 million for the first quarter of 1920. Re-exports, at £11 million, were £7 million less than the relatively high figure for the previous quarter and the smallest for fifteen months. Allowing for the rise in average values since 1938, the volume of retained imports rose from 67 per cent. of the 1938 average in the first quarter of this year to 77 in the second and 89 in the third. Apart from the setback in the first quarter of this year caused by seasonal influences and the bad weather, there has been a continuous rise in retained imports from 53 per cent. of 1938 in the last quarter of 1945; the advance last quarter was the most striking.

The value of United Kingdom exports rose by £38 million compared with the second quarter and, at £303 million, was the highest since the fourth quarter of 1920. Shipments by N.A.A.F.I. and U.N.R.R.A. together accounted for only 2½ per cent. of the total. The volume of exports (114 per cent. of the 1938 average) showed a marked improvement on the first and second quarters, when the figures were 101 and 102 respectively, and just exceeded the post-war peak of 111 recorded in the fourth quarter of 1946. The figure for July was (as last year) unusually large, 126, while those for August (105) and September (111) were affected by holidays. The average of 114 for the quarter compares with an overall target of 143 per cent. of 1938 to be attained by the middle of 1948.

The index numbers of average values of imports and exports, which had both risen steeply between the first and second quarters of this year, showed only moderate increases between the second and third quarters—1½ per cent. for imports and 2 per cent. for exports. The index numbers of prices, however, record roughly equal advances between the two quarters, and it is evident that changes in make-up were primarily responsible for the average value figures being rather out of line. Both sets of figures show a divergence between the rise for imports and that for exports, 166 per cent. and 126 per cent. for average values and 153 per cent. and 133 per cent. for prices, and on either basis the terms of trade have worsened since 1938.

Retained Imports

The volume of retained imports of food, drink and tobacco has risen almost without interruption since the minimum figure of 51 per cent. of 1938 in the last quarter of 1945, and last quarter was only 16 per cent. short of the

(*Continued at foot of next page*)

Imports Retained in the United Kingdom

Class	3rd Quarter 1946	4th Quarter 1946	1st Quarter 1947	2nd Quarter 1947	3rd Quarter 1947
	£ million				
Food, drink and tobacco :—					
As declared ...	157·7	173·2	182·4	211·8	228·5
At average values of 1938 ...	71·2	73·2	74·2	80·3	87·3
Raw materials and articles mainly unmanufactured :—					
As declared ...	88·2	103·4	89·8	128·3	158·6
At average values of 1938 ...	39·7	43·0	35·2	44·3	53·8
Articles wholly or mainly manufactured :—					
As declared ...	63·2	72·3	67·1	92·5	114·8
At average values of 1938 ...	34·4	34·0	28·7	36·7	44·9

NOTE.—The quarterly averages in 1938 for the above three classes were, in million £, 104·5, 54·5 and 52·8.

Total Imports

Class and Group	Value as declared	Value at 1938 prices		Index numbers of average values			Index numbers of volume		
	3rd Quarter 1947	3rd Quarter 1947	2nd Quarter 1947	1st Quarter 1947	2nd Quarter 1947	3rd Quarter 1947	1st Quarter 1947	2nd Quarter 1947	3rd Quarter 1947
	£'000	£'000	£'000	(1938=100)			(1938=100)		
I.—Food, Drink and Tobacco—									
A. Grain and flour	39,480	13,019	14,264	294	301	303	52	77	70
B. Feeding-stuffs for animals	3,375	764	457	463	426	442	42	16	27
C. Animals, living, for food	3,142	1,251	1,163	226	236	251	30	50	54
D. Meat	43,359	22,111	18,440	198	194	196	76	81	98
E. Dairy produce	42,443	17,107	13,039	215	228	248	72	65	86
F. Fresh fruit and vegetables	25,449	8,399	7,004	318	318	303	73	74	89
G. Beverages and cocoa preparations	23,620	10,059	7,917	202	264	235	77	68	87
H. Other food	41,943	12,361	14,804	281	320	339	74	104	87
I. Tobacco	7,031	2,810	4,183	246	245	250	102	72	48
Total, Class I	229,842	87,881	81,271	245	263	262	70	76	82
II.—Raw Materials and Articles Mainly Unmanufactured—									
A. Coal	2,115	704	3	*	*	300	*	*	*
B. Other non-metalliferous mining and quarry products and the like	4,900	1,796†	1,299†	203†	208†	225†	96†	106†	147†
C. Iron ore and scrap	6,187	3,556	2,938	178	164	174	80	105	128
D. Non-ferrous metalliferous ores and scrap	6,586	3,093	2,755	174	188	213	72	67	76
E. Wood and timber	41,831	13,285	6,163	275	291	315	30	58	124
F. Raw cotton and cotton waste	11,478	3,463	7,292	269	314	331	79	99	47
G. Wool, raw and waste, and woollen rags	18,763	9,797	8,547	163	188	192	49	80	92
H. Silk, raw and waste, and artificial silk waste	593	176	150	519	388	337	22	29	34
I. Other textile materials	5,778	1,902	1,861	300	290	304	77	63	65
J. Seeds and nuts for oil, oils, fats, resins and gums	35,895	8,277	8,375	313	414	434	76	109	108
K. Hides and skins, undressed	11,356	3,433	2,903	255	329	331	92	64	75
L. Paper-making materials	9,479	2,748	2,344	257	296	345	40	58	69
M. Rubber	4,231	2,487	3,542	194	197	170	191	123	86
N. Miscellaneous raw materials and articles mainly unmanufactured	7,138	2,229	2,357	333	296	320	86	89	85
Total, Class II	166,330	56,946	50,529	243	278	291	68	81	92
III.—Articles Wholly or Mainly Manufactured—									
A. Coke and manufactured fuel	33	5	6	*	*	*	*	*	*
B. Pottery, glass, abrasives, etc.	1,882	629	462	294	297	299	19	26	35
C. Iron and steel and manufactures thereof	4,062	1,493	1,784	213	237	272	39	48	40
D. Non-ferrous metals and manufactures thereof	23,625	10,928	8,404	229	229	216	47	82	107
E. Cutlery, hardware, implements and instruments	1,337	453	452	281	281	295	21	26	26
F. Electrical goods and apparatus	739	302	222	250	252	245	19	28	38
G. Machinery	8,379	3,710	2,887	219	235	226	44	53	68
H. Manufactures of wood and timber	5,049	1,534	1,354	328	314	329	51	86	98
I. Cotton yarns and manufactures	5,995	1,187	663	312	525	505	44	85	151
J. Woollen and worsted yarns and manufactures	2,272	661	502	308	352	344	58	52	69
K. Silk and artificial silk yarns and manufactures	2,469	571	494	388	425	432	40	40	46
L. Manufactures of other textile materials	5,179	1,175	792	337	397	441	61	69	102
M. Apparel	700	169	183	395	404	414	8	9	8
N. Footwear	745	223	258	397	302	334	21	37	32
O. Chemicals, drugs, dyes and colours	7,274	3,566	3,328	217	207	204	61	98	105
P. Oils, fats and resins, manufactured	27,626	12,660	9,423	180	200	218	92	86	115
Q. Leather and manufactures thereof	4,620	1,382	1,307	342	310	334	69	81	86
R. Paper, cardboard, etc.	5,914	1,929	2,216	280	294	307	34	60	52
S. Vehicles (including locomotives, ships and aircraft)	1,867	628	558	263	280	297	29	49	55
T. Rubber manufactures	34	15	8	*	*	*	8	5	9
U. Miscellaneous articles wholly or mainly manufactured	6,838	2,630	2,672	286	279	280	38	51	51
Total, Class III	116,639	45,850	37,975	234	250	254	51	65	79
IV.—Animals, not for Food	2,649	1,147	767	182	246	231	91	92	138
V.—Parcel Post	3,174	2,939	3,221	*	*	*	408	297	271
TOTAL, ALL CLASSES	**518,634**	**194,763**	**173,763**	**238**	**262**	**266**	**66**	**76**	**85**

* These figures would have no significance.
† Exclusive of diamonds imported and recorded in 1947, such imports not having been recorded in 1938.

(*Continued from previous page*)

1938 average, the rise on the quarter being 9 per cent. Compared with the second quarter substantial increases were recorded for meat, fresh fruit and vegetables, and beverages—each of which were little below the pre-war volume—and for dairy produce. The index numbers for meat, dairy produce and fresh fruit and vegetables were the highest for three, four and eight years respectively. The increase for beverages was essentially seasonal.

On the other hand the index numbers for grain and flour, miscellaneous foodstuffs and tobacco were each lower. Apart from the second quarter, grain and flour imports were

the largest in volume for four years. The contraction in tobacco imports to half the 1938 average was partly seasonal, as was the smaller reduction in miscellaneous foodstuffs.

Raw Materials

There was a further marked increase in the volume of retained imports of raw materials to only one per cent. short of the 1938 average. The previous quarter's figure of 81 per cent. of 1938 was itself the highest since the end of the war, and indeed since 1940 ; for the first nine months of the year the volume was 18 per cent. below 1938.

Though the volume for the class as a whole was almost equal to the 1938 average there were considerable divergences from this average for most of the groups. Among the more important groups, wood and timber, oilseeds, oils, etc., wool, iron ore and scrap, and hides and skins all exceeded their pre-war volumes, the figures for wood and timber and iron ore and scrap being the highest since the outbreak of war. The doubling for wood and timber of the figure for any quarter for eight years, is outstanding.

Paper-making materials, though the highest for two years, only reached two thirds of the 1938 average. With the exception of oilseeds, oils, etc., which were substantially unchanged, and of cotton, increases over the second quarter were recorded for all the principal groups. Coal imports were substantial for the first time since 1926-27 when they were large on account of the coal stoppage.

The diminished volume of our entrepot trade since 1938 is reflected in the index numbers for wool, rubber and hides and skins. Total imports were in each case smaller than the average before the war but, with re-exports at three-fifths of the 1938 rate for wool and rubber and one-sixth for hides and skins, retained imports were respectively 106, 94 and 140 per cent. of the pre-war volume.

Imports of Manufactures

The volume of retained imports of manufactures showed a further expansion and, at 83 per cent. of the pre-war average, was much the highest since 1944. Whether valued at 1938 or at 1947 prices non-ferrous metals and manufactured oils (essentially refined petroleum) together represented about half of the class total. The volume index for the former (137) was the highest for three years and for the latter (115) since the first quarter of 1946. Chemicals, drugs, etc. just exceeded the pre-war average and retained imports were the largest for three years. During 1946 retained imports of machinery remained almost constant from quarter to quarter at one-third of the pre-war volume ; this year has seen a rapid expansion in imports, however, and the volume index (69) for the third quarter was the highest since the end of 1944. A further heavy shipment of Japanese grey cloth for processing in this country raised the volume of cotton yarns and manufactures to three-fifths above the 1938 average. Leather and manufactures equalled the pre-war volume for the first time since 1940, while timber manufactures (101) and miscellaneous textile manufactures (104) just exceeded it and were the largest for two and three years respectively.

Average Values

The index number of average values of total imports was 266 compared with 262 and 238 in the two preceding quarters. Average values of food, drink and tobacco (262) were substantially unchanged, but increases were recorded for most groups and the result is largely due to changes in make-up. The index numbers for raw materials (291) and manufactured articles (254) rose by 5 per cent. and 2 per cent. respectively, but here too, make-up changes were of some importance. Average values of the three largest groups of raw materials, wood and timber, wool and oilseeds, oils, etc., rose by 8, 2 and 5 per cent. respectively. Among manufactures average values of manufactured oils rose by 9 per cent. and those of non-ferrous metals fell by 6 per cent.

United Kingdom Exports

The volume of exports of food, drink and tobacco (86 per cent. of 1938) was one-fifth higher than in the preceding three months and the highest since the third quarter of last year (when large emergency supplies were being sent to Germany). Tobacco exports rose to nearly double the 1938 volume—the highest ever recorded—and those of beverages (the largest since the end of the war) were only 5 per cent. short of 1938.

Exports of raw materials fell still further to little more than one-fifth of the 1938 average. Coal exports remained insignificant (3 per cent. of 1938), while those of wool fell heavily to only 51 per cent. of 1938—the lowest figure for nearly two years. Further shipments of brass scrap (mainly to the United States for refining and return of the copper to this country) resulted in an increase in exports of non-ferrous ores and scrap to nearly three-fifths higher than in 1938.

Exports of Produce and Manufactures of the United Kingdom

Class	3rd Quarter 1946	4th Quarter 1946	1st Quarter 1947	2nd Quarter 1947	3rd Quarter 1947
	£ million				
Food, drink and tobacco :—					
As declared ...	16·4	14·1	12·9	14·9	17·7
At average values of 1938 ...	8·2	7·1	6·0	6·5	7·7
Raw materials and articles mainly unmanufactured :—					
As declared ...	7·4	9·1	10·0	9·1	7·8
At average values of 1938 ...	3·6	4·3	4·2	3·6	3·9
Articles wholly or mainly manufactured :—					
As declared ...	208·8	234·9	218·3	232·5	268·0
At average values of 1938 ...	106·9	115·2	104·3	106·1	119·5

NOTE.—The quarterly averages in 1938 for the above three classes were, in million £, 9·0, 14·2 and 91·3.

Manufactured Articles

The volume of exports of manufactures exceeded the 1938 average by 31 per cent. This was one-eighth higher than in the preceding three months and 4 per cent. above the previous peak figure, for the fourth quarter of 1946.

For the three main divisions of manufactured articles, as well as for the more important individual groups, the following table shows the volume of exports in the period under review compared with the fourth quarter of 1946 and with the volume targets set for the middle of 1948. The four cases where the target figure is no higher than the exports in the last quarter of 1946 are all shown in the table. The volume is here shown in terms of index numbers based on the fourth quarter of 1946=100.

Description	Value of Exports in 4th Qtr. 1946	Volume Index Numbers 4th Qtr. 1946=100	
		3rd Qtr. 1947	Target Mid-1948
	£ million		
Iron and steel	19·69	109	100
Non-ferrous metals	9·66	92	99
Machinery	38·61	114	151
Vehicles (excl. tyres and tubes)	34·97	116	147
Other metal manufactures ...	20·03	103	108
Total metals and metal products	122·96	110	130
Cotton goods	17·07	105	132
Woollen and worsted goods ...	12·81	103	164
Apparel	10·50	65	89
Other textiles and clothing ...	13·58	89	117
Total textile manufactures ...	53·96	93	127
Chemicals, drugs, etc.	17·53	95	117
Pottery, glass, abrasives, etc....	7·82	98	122
Leather and Rubber manufactures	3·92	75	154
Paper, cardboard, etc. ...	4·38	102	99
Other manufactures	24·29	98	129
Total miscellaneous manufactures	57·94	96	124

The metal groups are the only one of the three main divisions of manufactures for which the fourth quarter level was exceeded, the increase of 10 per cent. being shared by all groups except non-ferrous metals. Compared with 1938 the volume of exports of metals as a whole showed an increase of 69 per cent. Iron and steel exports were only

(*Continued on page* 1885)

Retained Imports

Class and Group	Value as declared	Value at 1938 prices		Index numbers of average values			Index numbers of volume		
	3rd Quarter 1947	3rd Quarter 1947	2nd Quarter 1947	1st Quarter 1947	2nd Quarter 1947	3rd Quarter 1947	1st Quarter 1947	2nd Quarter 1947	3rd Quarter 1947
	£'000	£'000	£'000	(1938=100)			(1938=100)		
I.—Food, Drink and Tobacco—									
A. Grain and flour	39,404	12,993	14,259	294	301	303	53	78	71
B. Feeding-stuffs for animals	3,375	764	457	463	426	442	42	16	27
C. Animals, living, for food	3,142	1,251	1,163	226	236	251	30	50	54
D. Meat	43,179	22,017	18,338	198	194	196	76	81	98
E. Dairy produce	42,326	17,040	12,975	216	228	248	72	65	86
F. Fresh fruit and vegetables	25,414	8,388	6,992	318	318	303	75	77	92
G. Beverages and cocoa preparations	23,111	9,777	7,355	206	272	236	80	73	97
H. Other food	41,566	12,247	14,544	281	320	339	75	104	88
I. Tobacco	7,001	2,797	4,170	246	245	250	105	74	50
Total, Class I	228,518	87,274	80,253	246	264	262	71	77	84
II.—Raw Materials and Articles Mainly Unmanufactured—									
A. Coal	2,115	704	3	*	*	300	*	*	*
B. Other non-metalliferous mining and quarry products and the like	4,781	1,764†	1,251†	203†	205†	223†	98†	110†	155†
C. Iron ore and scrap	6,187	3,556	2,937	178	164	174	80	105	128
D. Non-ferrous metalliferous ores and scrap	6,582	3,091	2,754	174	188	213	76	72	80
E. Wood and timber	41,812	13,279	6,151	275	291	315	30	58	125
F. Raw cotton and cotton waste	10,799	3,251	6,837	269	312	332	82	97	46
G. Wool, raw and waste, and woollen rags	14,252	7,981	6,697	124	175	179	39	89	105
H. Silk, raw and waste, and artificial silk waste	576	171	147	521	386	337	22	29	34
I. Other textile materials	5,642	1,869	1,844	300	289	302	82	67	68
J. Seeds and nuts for oil, oils, fats, resins and gums	35,536	8,216	8,322	310	412	433	76	111	109
K. Hides and skins, undressed	10,542	3,038	2,319	265	363	347	171	107	140
L. Paper-making materials	9,479	2,748	2,344	257	296	345	40	59	69
M. Rubber	3,569	2,069	470	271	420	172	61	21	94
N. Miscellaneous raw materials and articles mainly unmanufactured	6,777	2,100	2,255	334	298	323	92	96	89
Total, Class II	158,649	53,837	44,331	254	288	293	65	81	99
III.—Articles Wholly or Mainly Manufactured—									
A. Coke and manufactured fuel	33	5	6	*	*	*	*	*	*
B. Pottery, glass, abrasives, etc.	1,872	626	458	294	297	299	19	26	35
C. Iron and steel and manufactures thereof	4,059	1,492	1,779	213	237	272	39	49	41
D. Non-ferrous metals and manufactures thereof	23,589	10,905	8,379	229	229	216	61	106	137
E. Cutlery, hardware, implements and instruments	1,204	397	409	287	288	303	22	26	25
F. Electrical goods and apparatus	727	297	211	250	253	245	18	28	39
G. Machinery	8,234	3,625	2,816	220	237	227	45	54	69
H. Manufactures of wood and timber	5,045	1,533	1,353	328	314	329	53	89	101
I. Cotton yarns and manufactures	5,982	1,185	658	312	525	505	46	90	161
J. Woollen and worsted yarns and manufactures	2,133	612	471	302	354	349	62	56	72
K. Silk and artificial silk yarns and manufactures	2,382	552	471	386	424	432	43	42	50
L. Manufactures of other textile materials	5,153	1,168	786	336	398	441	62	70	104
M. Apparel	650	157	175	394	405	414	8	9	8
N. Footwear	743	222	258	397	301	335	22	38	32
O. Chemicals, drugs, dyes and colours	7,011	3,444	3,242	217	206	204	62	99	105
P. Oils, fats and resins, manufactured	27,087	12,321	8,673	178	202	220	90	81	115
Q. Leather and manufactures thereof	4,619	1,382	1,306	342	310	334	80	94	100
R. Paper, cardboard, etc.	5,912	1,928	2,212	279	295	307	34	60	52
S. Vehicles (including locomotives, ships and aircraft)	1,755	575	516	272	284	305	26	50	56
T. Rubber manufactures	33	15	8	*	*	*	7	5	9
U. Miscellaneous articles wholly or mainly manufactured	6,538	2,465	2,524	295	281	265	38	54	53
Total, Class III	114,761	44,906	36,711	234	252	256	53	68	83
IV.—Animals, not for Food	2,401	1,038	690	182	247	231	113	105	158
V.—Parcel Post	3,174	2,939	3,221	*	*	*	408	297	271
TOTAL, ALL CLASSES	**507,503**	**189,994**	**165,206**	**241**	**265**	**267**	**67**	**77**	**89**

* These figures would have no significance.

† Exclusive of diamonds imported and recorded in 1947, such imports not having been recorded in 1938.

Exports of Produce and Manufactures of the United Kingdom

Class and Group	Value as declared	Value at 1938 prices		Index Numbers of average values			Index Numbers of volume		
	3rd Quarter 1947	3rd Quarter 1947	2nd Quarter 1947	4th Quarter 1946	2nd Quarter 1947	3rd Quarter 1947	4th Quarter 1946	2nd Quarter 1947	3rd Quarter 1947
	£'000	£'000	£'000	(1938=100)			(1938=100)		
I.—Food, Drink and Tobacco—									
A. Grain and flour	191	63	67	228	269	302	86	16	15
B. Feeding-stuffs for animals	41	22	24	179	205	187	9	14	12
C. Animals, living, for food	1	0	0	*	*	*	*	*	*
D. Meat	136	87	53	155	163	156	29	17	28
E. Dairy produce	337	144	111	171	222	234	36	40	52
F. Fresh fruit and vegetables	67	25	62	286	282	268	124	63	25
G. Beverages and cocoa preparations	5,367	3,266	2,626	155	158	164	75	76	95
H. Other food	6,037	1,736	1,709	234	337	348	58	57	58
I. Tobacco	5,504	2,367	1,849	214	227	233	168	150	193
Total, Class I	17,681	7,710	6,501	198	228	229	79	72	86
II.—Raw Materials and Articles Mainly Unmanufactured—									
A. Coal	563	261	179	208	208	216	9	2	3
B. Other non-metalliferous mining and quarry products and the like	601	292	219	206	208	206	88	83	110
C. Iron ore and scrap	41	15	9	*	*	*	1	6	10
D. Non-ferrous metalliferous ores and scrap	3,049	902	809	238	377	338	126	141	157
E. Wood and timber	63	22	34	229	244	279	310	193	126
F. Raw cotton and cotton waste	73	16	32	238	315	465	35	28	14
G. Wool, raw and waste, and woollen rags	1,555	798	1,303	144	170	195	87	83	51
H. Silk, raw and waste, and artificial silk waste	327	132	138	203	211	249	111	83	80
I. Other textile materials	83	44	180	161	138	188	44	267	65
J. Seeds and nuts for oil, oils, fats, resins and gums	259	63	76	296	488	414	35	11	9
K. Hides and skins, undressed	226	72	131	342	280	316	29	47	26
L. Paper-making materials	72	29	42	222	236	250	23	14	10
M. Rubber	137	93	49	200	189	147	217	87	164
N. Miscellaneous raw materials and articles mainly unmanufactured	751	249	427	335	320	301	57	70	41
Total, Class II	7,800	2,988	3,628	211	252	261	30	25	21
III.—Articles Wholly or Mainly Manufactured—									
A. Coke and manufactured fuel	31	12	10	161	*	*	17	1	1
B. Pottery, glass, abrasives, etc.	8,519	3,761	3,449	205	219	227	159	144	157
C. Iron and steel and manufactures thereof	22,642	11,884	11,021	180	185	191	105	106	114
D. Non-ferrous metals and manufactures thereof	11,081	5,546	5,122	160	186	200	196	166	180
E. Cutlery, hardware, implements and instruments	9,834	4,526	3,900	197	211	217	190	173	201
F. Electrical goods and apparatus	13,996	6,129	5,029	192	215	228	178	148	180
G. Machinery	48,086	24,304	21,453	181	194	198	147	148	168
H. Manufactures of wood and timber	387	116	138	299	284	334	45	47	40
I. Cotton yarns and manufactures	20,393	5,577	5,105	323	362	366	43	41	45
J. Woollen and worsted yarns and manufactures	15,214	6,132	5,101	214	243	248	89	76	91
K. Silk and artificial silk yarns and manufactures	7,199	1,926	1,911	337	360	374	150	139	140
L. Manufactures of other textile materials	7,081	1,992	2,079	285	336	355	87	78	75
M. Apparel	7,307	2,622	2,964	261	272	279	189	139	123
N. Footwear	1,588	624	649	207	259	254	183	132	127
O. Chemicals, drugs, dyes and colours	18,941	8,511	7,287	196	216	223	161	131	153
P. Oils, fats and resins, manufactured	2,475	1,112	1,139	181	197	223	64	85	83
Q. Leather and manufactures thereof	1,821	586	606	246	291	311	79	61	59
R. Paper, cardboard, etc.	4,645	2,055	1,889	218	217	226	116	109	119
S. Vehicles (including locomotives, ships and aircraft)	45,805	22,477	19,264	192	202	204	177	173	202
T. Rubber manufactures	1,579	684	697	221	210	231	222	169	166
U. Miscellaneous articles wholly or mainly manufactured	19,381	8,892	7,321	200	210	218	121	102	123
Total, Class III	268,005	119,468	106,134	204	219	224	126	116	131
IV.—Animals, not for Food	1,011	252	289	359	374	401	191	170	148
V.—Parcel Post	8,152	3,610	3,512	*	*	*	115	117	120
TOTAL, ALL CLASSES	**302,649**	**134,028**	**120,064**	**204**	**221**	**226**	**111**	**102**	**114**

* These figures would have no significance.

U.K. Imports and Exports—*(Continued)*

14 per cent. higher but for the other groups the increases ranged from 68 per cent. for machinery to more than double for both vehicles and cutlery, hardware, etc.

Exports of iron and steel were 9 per cent. above the target figure of 100 for mid-1948. The needed expansion in machinery (33 per cent.) is greater than that for vehicles (27 per cent.).

Exports of textiles and clothing were only 72 per cent. of 1938—6 per cent. higher than in the preceding three months but otherwise the smallest since the second quarter of last year. Exports of cotton goods (45 per cent. of 1938) and of woollen and worsted goods (91 per cent. of 1938) were each the highest for nearly six years, just exceeding the figures for the last quarter of 1946. Silk and rayon exports were substantially the same as in the preceding three months (two-fifths above 1938) and below those in any other quarter since the beginning of 1946. The volume of apparel exports (though still nearly one-quarter higher than in 1938) showed the third successive decline from the peak figure (189) in the fourth quarter of last year, as also did miscellaneous textiles exports but the reduction shown in this case (from 87 to 75) has not been so striking. All the textile groups have a long way to go to reach the target figures for mid-1948, but the expansion of 60 per cent. needed in woollen and worsted goods far exceeds that in any other group.

For all other manufactures the volume of exports (122 per cent. of 1938) was one-eighth higher than in the preceding three months, the two largest groups—miscellaneous manufactures and chemicals, drugs, etc.—showing increases of one-fifth and one-sixth respectively. Increases were also recorded for pottery, glass, etc., and paper, cardboard, etc., but the remaining groups in this section showed small reductions compared with the preceding quarter; the 1938 volume was, however, still exceeded by 27 per cent. for footwear and 66 per cent. for rubber manufactures.

Except for paper, cardboard, etc., for which the 1948 target and the volume of exports now are both about the same as in the fourth quarter of 1946, a substantial expansion is called for in all the groups of miscellaneous manufactures; the target for both leather and rubber manufactures is more than double the exports in the past quarter.

Average Values

The index number of average values of total exports was 226 compared with 221 and 211 in the two preceding quarters. For manufactures, as for total exports, the increase compared with the preceding quarter was 2 per cent., textiles showing a rather smaller increase (1½ per cent.) than either metals or miscellaneous manufactures (each increased by 3 per cent.). Compared with 1938, average values of textiles exported are now 213 per cent. higher, while those of metals and of other manufactures have risen by 102 per cent. and 126 per cent. respectively. For food, drink and tobacco the index was substantially the same as in the preceding quarter, although each of the three largest groups showed an upward movement. The index for raw materials increased by 3½ per cent., there being a large rise in average values of wool, but, as in the case of food, drink and tobacco, the result is affected by changes in make-up, notably the reduced importance of wool, which, notwithstanding the recent marked increase, still has an average value much below that of raw materials as a whole.

Marking of Imported Goods

THE attention of importers, manufacturers, dealers and traders is drawn to the requirements of the Merchandise Marks Acts, 1887 and 1926, in regard to the marking of imported goods. In accordance with these requirements, imported goods must bear an indication of origin in the following circumstances:—

(i) If at the time of importation into, or on sale or exposure for sale in the United Kingdom, they bear any name or trade mark being or purporting to be the name or trade mark of any manufacturer, dealer, or trader, or the name of any place, in the United Kingdom.

(ii) If they are goods of a class or description subject to compulsory marking with an indication of origin under a special Order in Council made under Section 2 of the Merchandise Marks Act, 1926.

The following Notices explaining the above requirements may be obtained free of charge on application either to the Board of Trade, I.M. (General) Division, Millbank, London, S.W.1, or to the Department of Customs and Excise, City Gate House, Finsbury Square, London, E.C.2:—

Notice 33.—Joint Memorandum by the Board of Trade and Commissioners of Customs and Excise respecting the requirements under the Merchandise Marks Acts 1887 and 1926 as to marks on imported goods.

Notice 33A.—Summarizing the special requirements in respect of imported goods of classes and descriptions subject to Orders in Council made under Section 2 of the Merchandise Marks Act, 1926.

Notice 33B.—List of goods (other than agricultural and horticultural produce and fishery products) subject to Orders in Council under Section 2 of the Merchandise Marks Act, 1926.

Enquiries in regard to the marking with an indication of origin of imported agricultural and horticultural produce and fishery products should be addressed to the Ministry of Agriculture and Fisheries, 4 Bickenhall Mansions, London, W.1.

False Trade Description

Manufacturers, dealers and traders are also reminded that under the Merchandise Marks Act, 1887, it is an offence to apply a false trade description to any goods, or to sell or expose for sale in the United Kingdom any goods to which a false trade description is applied. Trade description is defined in the Act as meaning "any description, statement or other indication, direct or indirect,

(a) as to the number, quantity, measure, gauge, or weight of any goods, or

(b) as to the place or country in which any goods were made or produced, or

(c) as to the mode of manufacturing or producing any goods, or

(d) as to the material of which any goods are composed, or

(e) as to any goods being the subject of an existing patent, privilege, or copyright."

False trade description is defined in the Act as meaning "a trade description which is false in a material respect as regards the goods to which it is applied."

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Questions Asked and Answered in Parliament

Below is a selection of questions of interest to industry answered in Parliament.

TUESDAY OCTOBER 28

Stocks and Imports of Silk.

The Parliamentary Secretary to the Board of Trade, Mr. J. W. Belcher, stated that stocks were about 480,000 lbs. of raw silk in this country. The volume of imports we could afford in 1948 must depend largely on the success of British silk manufacturers in finding export markets for their products. So long as the industry maintained the necessary proportion of exports the Government would do their best to keep it supplied with the silk it needed. He could not at present say what the price would be.

Pottery Working Party.

Good progress, Mr. Belcher announced, had been made towards implementing the majority of the thirty detailed recommendations of the Working Party Report on the Pottery Industry. It would be impracticable within the scope of a Parliamentary answer to describe the steps taken in each case. Discussions concerning the establishment of a Development Council were taking place with both sides of the industry and the first draft of the necessary Statutory Order was being sent to them for comment.

Re-Export Licences.

The Secretary for Overseas Trade, Mr. A. G. Bottomley, stated that during the three months July/September, import licences to a value of £2,336,000 were granted in respect of goods for re-export in the same form. The exports of imported merchandise during the same period were over £11,000,000, but this included goods not requiring an import licence.

War Damage Compensation.

Mr. Belcher stated that the Government, as at present advised, did not propose to increase the amount of war damage compensation payable under the Business Scheme ; in view of the supply position it was not yet possible to announce the date when deferred claims under this Scheme would be paid.

Hosiery Export Prices.

A questioner asked if the Board of Trade was aware that hosiery manufacturers had been losing American orders because prices were too high, owing to the fact that yarn used in the home trade had been subsidized by that used in the export trade.

Mr. Belcher stated that the maximum prices for wool tops were removed on October 24, and any difficulties of the kind mentioned should therefore disappear.

Trade with U.S.S.R.

Asked when negotiations with U.S.S.R. for a trade agreement were to be re-opened, Mr. Bottomley said discussions had been proceeding about the possibility of re-opening negotiations, but he regretted that he was not in a position to make a statement.

Imports of Leather.

The reduced purchases of leather for the last quarter of the year were much below the total of offers received, Mr. Bottomley stated, and were taken from those exporters whose offers were deemed by the Control most favourable in price and quality.

Financial Agreement with the United States.

The President of the Board of Trade was asked whether request had been made to the United States Administration by His Majesty's Government to be freed from the obligations of Article 9 of the Financial Agreement.

The President, Mr. Harold Wilson, made the following statement :

During the visit of the Eady Mission to Washington in August, discussions took place between the Mission and officials of the United States Administration about the present position as regards the non-discrimination provisions of the American Loan Agreement. During these talks the officials of the two Governments were able to discuss and explore together in detail the practical interpretation of the provisions of Section 9 of the Loan Agreement against the background of the overseas financial position of the United Kingdom. These discussions revealed that there existed very substantial agreement between the two Governments about the meaning of these provisions relating to non-discrimination. When Mr. Snyder came to this country in September for the International Monetary Fund Meetings, these discussions continued on the official plane. At the conclusion of Mr. Snyder's visit to this country, the following statement was issued by the United States Embassy in London :—

" In his statement to the Press on September 15 last, Mr. John W. Snyder, the United States Secretary of the Treasury, pointed out that when two Governments work out any Agreement it must be kept flexible. This was the spirit of the original Loan negotiations and it is the purpose and intention of the officials of the two Governments who are presently dealing with this problem. The framers of the Anglo-American Financial Agreement specifically recognize the existence of unusual aspects of the United Kingdom position requiring certain deviations from any inflexible rule of non-discrimination. It is basic to an understanding of Section 9 of the Agreement to appreciate that it was never intended to constitute a strait-jacket on British trade."

In the light of the discussions which have taken place and of the above statement, His Majesty's Government are satisfied that for the present, world supplies being what they are, the provisions of Section 9 of the Loan Agreement are not operating to prevent the United Kingdom from importing any goods, including foodstuffs, which we are anxious to take and which we can afford to buy. As regards the future position, discussions are continuing.

Duty Payable by Leather Producers

Following discussions with the Leather, Footwear and Allied Industries Export Corporation Ltd., the Board of Trade have made an Order* halving the rate of levy payable by leather producers on purchases of hides, skins and tanning materials under the Encouragement of Exports (Leather, Footwear and Allied Products) Order 1940. Levy payments which become due on or after November 1, 1947, will be assessed at the new rate of one-eighth of one per cent. of the purchase price.

* The Encouragement of Exports (Leather, Footwear and Allied Products) (Amendment) Order, 1947, S.R. & O. No. 2295, price 1d. Copies of the Order are obtainable from H.M. Stationery Office, York House, Kingsway, London, W.C 2 and branches, or through any bookseller.

Record Rayon Output in September

RAYON production in September rose steeply to 18·6 million lbs., a figure higher than any previously reported. This was 2 per cent. more than in July, which had one more day, and, compared with September last year, total production was 20 per cent. more, the increases for continuous filament yarn and for staple fibre being 15 per cent. and 27 per cent. respectively.

Production of Rayon*

(Million lbs. per month, " delivered weight " basis)

Period	Continuous Filament Yarn† (Singles)	Staple Fibre	Total
1939	9·6‡	4·9‡	14·5‡
1946	9·0	5·9	14·9
1947—			
January	10·3	7·3	17·6
February	6·3	6·5	12·8
March	8·7	7·1	15·8
April	9·5	5·7	15·2
May	10·2	6·4	16·6
June	10·0	6·8	16·8
July	10·5	7·7	18·2
August	8·0	4·9	12·9
September	10·7	7·9	18·6

* Including other synthetic fibres.
† Including strong yarn and other synthetic fibre yarns (not made in 1939).
‡ Based on Excise figures.

Coal Supplies Position During the Winter, 1947–48

THE Ministry of Fuel and Power have provided the following information of special interest to industrialists :—

The coal allocations for the coming winter which have been notified to all but the smaller of the consuming firms (who are supplied under annual allocations) represent the tonnages which they may expect to receive from current production in weeks when coal production is not affected by colliery holidays, and take account of the assumed rate of de-stocking.

Apart from whatever may have been possible by the end of October to bring up the stocks of individual firms to the general level for the industry in the particular grade of coal, some provision is to be made for this purpose out of the reserve referred to below.

The Reserve

Reference has been made by the Minister of Fuel and Power, Mr. H. T. N. Gaitskell, to the decision to hold in reserve 1¼ million tons to meet claims for supplementary allocations for which the following are the qualifying conditions :—

(*a*) Where the full requirements of a firm have been incorrectly assessed. (The basis of assessment is present needs, and needs anticipated in the near future, assuming that labour and materials are available to permit of full operation. The requirement figures, therefore, have no necessary connection with past allocations or past consumption and will not be altered without special reasons.)

(*b*) Where, having regard to all the circumstances, an increase in an existing requirement figure can be justified as necessary to meet :—

(i) special circumstances not taken into account at the time of assessment of requirements, e.g., expansion of operations in connection with the export drive.

(ii) staggering of working hours.

(iii) demands which, for special technical reasons, cannot be reduced below a certain minimum and for which adequate provision has not been made.

(*c*) Where provision has not been made initially for the requirements of a factory which commences operations after November 3, 1947, or of a firm deconcentrated after that date.

(*d*) Where provision has not been made initially for an extension of an existing factory, which extension comes into operation after November 3, 1947.

(*e*) Where special relief is required for consumers with low stocks at the commencement of the winter due to factors outside their control.

It should be appreciated that there will not be a physical pool of stocks for this purpose and that until supplementary allocations are made from the reserve, the coal will be spread as evenly as possible among all industrial consumers, who will therefore tend at first to get more than their allocations.

Supplementary Allocations

Consumers who feel they have a strong case for additional allocations should address their applications to the Regional Controller of the appropriate Production Department.

Deliveries Against Allocations

Consumers will appreciate that during holiday periods despatches from the collieries against allocations will be at a reduced rate and the tonnage so under-delivered will not count as arrears to be made up at a later date.

The notification sent to the larger firms of their winter allocation describes the procedure for following up any appreciable under-delivery where the consumer is of the opinion that he is receiving less than the general level of deliveries of his type of coal. In the first instance contact should be made with the distributor or, if the coal is supplied direct, with the appropriate office of the National Coal Board, but in the last resort there is the right of reference to the Regional Controller of the appropriate Department.

Performance

In each Region the Fuel Allocations Committee will watch and report on the working of the scheme. The overall position will be under the constant supervision of the central Fuel Allocations Committee which is now under the Chairmanship of the Paymaster General.

Coke

The general arrangements for the notification of allocations of coke for the winter, the grounds for the grant of supplementary allocations and the oversight of performance under the winter scheme follow the general lines of the coal scheme, as nearly as the circumstances of the coke supplying industries permit. The winter allocations which operate as from the beginning of November are being based on last winter's consumption adjusted to offset the under-consumption during the fuel crisis, and will not be notified to firms concerned until a later date.

Minister's Survey

In a survey of the overall coal position on October 14, Mr. Gaitskell said :—

We set out in May, when the " coal " summer begins, to maintain production without interruption, and at the same time build up stocks for the coming winter to about 15 million tons. That meant raising stocks by about 9 million tons during the six summer months. In the main these objects have been achieved. True, production has been held up occasionally at some firms for lack of coal—as at the end of the Grimethorpe dispute, but there has not been any serious or widespread interference.

As for stocks the latest figure is 14·8 million tons on October 4. So it looks as though we are going to get the target all right. Indeed, I think we can safely reckon on having ¼ million more than the 15 million tons. We shall have added to the pile between May 1-November 1 the necessary 9 million tons. In the summer of 1946 we built up stocks by only 4 million tons, so we have done a great deal better—better by 5 million tons. When one recalls the gloomy outlook which faced us last March, it is impossible not to feel some satisfaction. But where have we got this improvement of 5 million tons from ? We had better not pat ourselves on the back too soon.

Two million tons is due to the decrease and virtual elimination of exports compared with the summer of 1946, 1·6 million tons to lower internal consumption this summer, and 1·3 million tons to higher summer supplies—nearly half of it imports. To cut down exports is not exactly a matter for congratulation these days. Reduced internal consumption results partly from coal-oil conversion, partly from greater economy in industry and partly from lower gas and electricity consumption—helped no doubt by the weather but also, as I believe, by economy at home. As for the slight increase in output, don't forget manpower was larger this year than last, though this year the pits were working 5 days instead of 6.

1947 Target

How about the 200 million tons target for 1947 we have heard such a lot about ? First remember that this figure was inserted in the Economic Survey, not as our estimate of the total amount of coal which we expected to be able to get in the present calendar year, but as an estimate of the amount of coal which, as a country, we needed to produce in order both to maintain industrial activity at the high level contemplated in the White Paper and to build up distributed stocks during the summer to a level of 15 million tons. So far this year we have obtained altogether 151·7 million tons (deep mined, 144·0 million tons ; opencast 7·7 million tons). This leaves us with 48·3 million tons to get by the end of the year. A great deal will depend upon the additional tonnage obtained through the increased hours of work and, in the case of opencast, upon the weather and the rate at which the new American excavators can be brought into use. It looks, however, as though we should be able to count upon obtaining 46 million tons during this period, making a total of about 197 million tons for the calendar year. If all goes well we may early do better. During the summer, however, total consumption has been about 3 million tons less than was originally expected and this explains why though we may not have achieved the 200 million tons, we may still expect to meet the minimum demands of the year 1947.

Now, however, I want to talk not about calendar years, but about the coal winter, November 1, 1947, to May 1, 1948. What are the prospects ? Take supplies first. Please remember that I am dealing now not with targets or aims which we should like to achieve, but with hard, objective estimates of what we think is likely to happen. Our total production estimate in this sense is deep mined 97 million tons and opencast 4¼ million tons—together 101¼ million tons, compared with 97¼ million tons actually achieved last winter. The estimate assumes that we shall be getting

something more from longer hours and implies an average weekly production of deep-mined coal alone throughout the winter of 3·75 million tons : it also implies that in the weeks not affected by statutory, Christmas and New Year holidays deep-mined output will need to average 3·9 million tons. We have only had the latter figure once this year so far. Last week's deep-mined output was 3,750,900 tons, and the total output with opencast was 4,017,100 tons. In addition to current production we can draw on our stocks We cannot, of course, take the whole of the 15¼ million tons. There is a minimum stock level below which you cannot fall without stoppages. We bumped into it last winter at 5½ million tons. After very careful examination I have decided that 6¼ million is the very minimum we must have at the end of the winter. So we can count on not more than 8¾ million tons from destocking. This, added to 101¼ million tons for current output, gives us 110 million tons.

Division of Supplies

How is this to be divided among the various users ? How much is to go to industry, how much to electricity, how much to gas, how much to coke ovens, how much to the domestic consumer, etc. ? You will find the answer given by the Government in the table accompanying this statement. But before I deal specifically with that, I want to emphasize two points. First, this table indicates how the Government have planned the coal shall be divided. It is the job of the National Coal Board to translate their decisions into actual instructions to collieries, distributors, etc. If everything turns out as we estimate then by and large the plan will be adhered to. But obviously the plan cannot be absolutely rigid. We have got to keep watch all the time and make adjustments as and when the situation demands.

Secondly, the plan is based on the principle that this winter we must do our utmost to see that industry gets all the coal it needs for the high production and export which has become imperative. As you see large industrial consumers are to get 23½ million tons and in addition there will be the equivalent of a further 900,000 tons of coal in the form of fuel oil for firms which are converting during the period. Total supplies thus equal 24·4 million tons, or 23 per cent. more than the coal consumed by industry last winter. This is just above the figure mentioned a few weeks ago by the Minister of Economic Affairs as covering the requirements of industry in full.

Now about coal for the domestic consumer. We had hoped earlier in the year to provide an appreciable increase in supplies of house coal, but we have come reluctantly to the conclusion that this just cannot be done. What we have decided is to provide the same as last winter plus an addition of about 4 per cent. to provide for the additional households that have been set up since then. The individual domestic consumer may therefore expect to receive about the same, but not more than last winter.

Except for electricity and gas, which I will come to in a moment, the other items do not call for any special comment. More coal (11 per cent.) goes to coke ovens so as to meet the needs of the steel industry. Most other groups get the same as last winter.

Electricity and Gas

I have left electricity and gas to the end for special reasons. Between them they are programmed to receive 30 million tons. This is slightly more than last winter's consumption. Here I want to underline an exceedingly important point. Whatever we may plan now we shall in fact have to see that power stations and gas works get enough coal to keep going. We cannot have a shut down of industry such as we had last winter. Therefore if gas and electricity consumption—especially the latter—rise above the level assumed in the programme we may be obliged to divert coal from elsewhere, and this means mostly from industry because it uses the same type of coal as the power stations. So I must once again emphasize with all the strength at my command the need for rigid economy by domestic consumers of electricity and gas.

On the programme figures industry will not be able to go all out unless domestic and other non-industrial consumers reduce their consumption by at the very least 10 per cent. below the level for last year. And, incidentally, let the household consumer who goes slow with electricity remember that he helps much more than twice over when he not merely saves, but saves during the hours of the peak load.

So much for the Coal Budget as a whole.

You will see that no specific provision is made for increasing exports—or, since the item in the table called export and bunkers is almost entirely bunkers, for exporting coal at all. Yet we have said at Paris that we intend to export 6 million tons in 1948, and if this is to be done we should really begin the job before the winter is over. If things go well, it may be possible to make a start. We will probably be pressed to start soon. But I am not prepared to commit myself at this stage when we have not even begun the winter.

Allocation to Industry

As I have already said, the Government have decided that the requirements of industry—amounting to 24·4 million tons—must be our first care. This figure has been built up from estimates of each firm's requirements prepared by the National Coal Board and scrutinized by the Regional Controllers of the various departments. It does not, however, take account of coal-oil conversions occurring in the winter. So the 900,000 tons which will be saved this way in industry can really be deducted from the 24·4 million tons, leaving 23½ million tons to be met from current deliveries and stocks. This is, of course, the figure in the table.

How much shall we assume can be taken from stocks by industry ? By November 1 industrial stocks should be about 4 million tons (3½ weeks on iron and steel and 4½ weeks on the average for the rest of industry). We think it fairly safe to assume a withdrawal of 2·2 million tons which would leave industry at the end of the winter with 2 weeks' stocks (iron and steel 1½ weeks')—well above the last winter's igures. So from current deliveries we have to find 21·3 million tons—and that is exactly what the Industrial Allocation plan provides for.

Here let me introduce a special note about iron and steel. This is a special case where it has been possible to fix the requirement figures very closely indeed and where it is essential not merely that the industry as a whole but each firm in it—whatever its stocks may be to start with—should be given its full requirements. Accordingly, in agreement with the industry, the stocks held by each firm are being taken into account in deciding the allocation.

In the rest of industry this is not so. We uphold the pledge given earlier in the year by the Government that a firm with larger stocks should not have a reduced allocation and vice versa. We are assuming that everybody can destock to the extent of 2½ weeks and thus cover in this way about 10 per cent. of requirements, and the allocation of each firm of course takes this into account. The destocking by other industry on this basis, together with destocking by iron and steel amount to the 2·2 million tons I mentioned earlier (to be precise 400,000 tons from iron and steel and 1·8 million tons for the rest of industry).

Current Deliveries

To return to the current deliveries of 21·3 million tons. We could have allocated the whole of this tonnage to individual firms straight away. But this would not have been wise. We shall certainly have to meet claims for supplementary allocations. In particular two classes of consumers will have to be catered for :

(*a*) firms whose level of stocks at the beginning of the winter was unduly low because of causes beyond their control, e.g. low deliveries during the summer, and who consequently cannot be expected to take so much from stocks ;

(*b*) firms whose requirements have been increased to assist the production and export drive and this has not already been taken into account.

Therefore we have decided to hold in reserve and not at first to allocate to individual firms 1½ million tons from which to meet these claims for supplementary allowances. This does not, of course, mean that there will be a physical pool of stocks held for this purpose by the Government or the National Coal Board, but simply that of the deliveries planned for industry, some 50,000 tons a week will not at first be earmarked. It will be spread evenly among all industrial consumers, who will therefore tend at first to get more than their allocations. As the reserve is drawn on for supplementary allocations, and allotted to industrial consumers, this general excess will disappear.

The granting of supplementary allocations will be done in the main not at Headquarters, but in the regions through the machinery of the Regional Boards who will also supervise the working of the scheme generally. The procedure which firms, who wish to raise queries about their allocations or complain about a failure to deliver, should follow is explained in the note they will each be receiving from the National Coal Board this month about their allocations.

I have already explained that in fixing allocations there has been—apart from the spécial case of steel—no differentiation between industrial firms on account of the varying level of their stocks. But in deciding how much a *whole* industry is to receive we have to a very slight extent taken into account the average level of stocks *in that industry* and

we have also paid some attention to the importance of the industry to the nation. But the influence of both considerations has not influenced the allocation by more than 5 per cent. either way. This has been accepted by the representatives of industry whom we consulted as in no way a breach of the Government pledge.

I must emphasize in conclusion two points. First, while the plan is designed to meet the essential needs of industry in full, some types and grades of coal will still be very scarce compared with others and firms must be prepared to substitute. Secondly, in this business of fuel allocation it is just not possible to give absolute guarantees either to individual consumers or to the whole of industry. It may be asked that, *whatever happens*, the needs of industry must be met in full. I cannot give this guarantee for the simple reason that if I were to do so and things went wrong it might lead very speedily to the closing down of power stations from which industry would itself suffer most. But what I can say is that in *programming* for the whole winter we have, as I hope is clear, imposed no cut on industry's full consumption requirements. The cuts will, as I have indicated, be borne elsewhere.

Supplies of Coke

No statement on the coal position of industry would be complete without a supplement on coke. Coke is supplied by the coke ovens and the gas works, and the coking coal required to produce the coke is included in the estimates I have already given. Nearly 1 million tons more coke will be available than last winter, but estimates of requirements show that the increasing needs of industry will absorb all this, and more than all this.

In coke, as in coal, supplies to industry must come first and we therefore plan to give :

(*a*) the steel industry all it requires—about one-quarter more than it had last year ;

(*b*) other industry about one-eighth more than last year. Other essential users of coke, such as dairies, bakeries, laundries, hospitals and schools, should receive the same as last year—with a small reserve.

When these needs have been met there will only be enough coke to provide domestic and non-industrial consumers (e.g., hotels, shops, offices, etc.) with substantially less than they had last winter. Nor are additional supplies of other boiler fuels (such as anthracite) likely to be sufficient to make up the coke deficiency, though they should be at much the same level as last winter. The necessary decision to put industry first must inevitably cause inconvenience and even at times hardship to domestic and other non-industrial consumers of boiler fuel.

The fuel position as disclosed by the figures already given will make it clear why we have not, so far, felt able to relax the bans on the heating of both industrial and commercial premises. The recent spell of mild weather has helped a great deal. The bans end automatically at the end of this month. I shall watch the position from day to day, and, if necessary, relax the restrictions in either or both cases at short notice. If that happens, everyone must realize the necessity of economizing very strictly now, so as to have more boiler fuel available for the really cold weather later on. It is better to feel a bit chilly in October than to be really frozen in February !

Perhaps it may help if I now recapitulate the main points of this statement.

First. Industry must come first—and our plans for both coal and coke recognize this.

Second. Domestic consumers may expect about the same coal as last year, but substantially less coke.

Thirdly. The weak spot on which the limelight must focus is domestic consumption of gas and electricity. Unless industry is to suffer non-industrial consumption must be at least 10 per cent. below last year's level.

Fourthly. The plan does not really provide for any exports of coal—only bunkers. Although we have set as our export target for 1948 at least 6 million tons, I cannot make provision for this yet.

I have been speaking to-day about our immediate problem of the winter and our short-term programme for getting through it—for getting through it, I hope, satisfactorily. But I am, I need hardly tell you, not unmindful of the long-run problems we still have to solve, and the long-run programme we still have to carry through. There will be other occasions when we can discuss these. But we certainly have a long way to go before the production of British coal has reached the level at which we can both sustain our own industry and play the part we ought to be playing, by our coal exports, in the reinvigoration of Europe's economic life. Our coal problem is not solved until we have reached the end of that road and it is not merely a matter of national self-interest, it must also be a matter of national pride, to reach it as soon as we can.

Estimated Coal Supplies for the Winter, 1947-48

	Million tons
Deep-mined coal	97·0
Opencast coal	4·25
Withdrawals from stock	8·75
Total	110·0

Coal distribution Winter, 1947-48

(million tons)

Programme	Coal supplies from current output and stocklifting, for Winter 1947/48	Actual consumption for Winter 1946/47
Large industrial consumers ...	23·51*	19·87*
Merchants' disposals :—		
House coal	16·90	16·30
Other ,, ...	1·30	1·38
Electricity	16·45	15·50
Gas	13·75	12·70
Coke ovens	10·75	9·70
Railways	7·50	7·70
Miners' coal and colliery consumption	8·70	8·40
Miscellaneous	8·34†	8·34†
Total Inland	107·20	99·89
Exports and Bunker ...	2·80	2·90
Total	110·00	102·79

* In comparing these two figures it should be noted that further conversions to fuel oil during the winter should provide the equivalent of just under a further one million tons of coal.

† This includes water, Northern Ireland, non-industrial consumers, coastwise bunkers, and small and seasonal industrial consumers.

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Shipping Statistics for September and Third Quarter 1947

Cargo Movement Highest since before the War

THE tonnage of vessels entering with cargo in the foreign trade in the third quarter was the highest since before the war, but the total of 12·66 million tons net, was 26 per cent. lower than in 1938. The figure for the preceding quarter was exceeded by 2,368,000 tons or 23 per cent., and the average for 1946 by 4,180,000 tons or nearly 50 per cent. Clearances (6·97 million tons net) were the highest since the first quarter of 1940 and reached 47 per cent. of the 1938 average.

Entrances and clearances according to the nationality of the vessels and the area traded with are mentioned later in this article. Of particular note is the increase of one-third in the entrances of foreign vessels as compared with the preceding quarter, the total including for the first time since the war a substantial number of German vessels. An increase of 59 per cent. in entrances from Northern Europe is also significant.

Of total entrances with cargo during the quarter vessels discharging mail only represented about 4 per cent. by tonnage, while vessels clearing with mail only accounted for nearly 8 per cent. of total clearances with cargo.

Foreign Trade : Entrances and Clearances

Month	ENTRANCES		CLEARANCES	
	Number	Thous. tons net	Number	Thous. tons net
	WITH CARGO*			
September 1947 :				
British	1,611	2,867	1,340	1,853
Foreign	1,593	1,380	567	532
Total :				
September 1947	3,204	4,247	1,907	2,385
September 1946	2,329	3,108	1,758	1,730
Total excluding vessels with mail only :				
September 1947	3,150	4,062	1,853	2,217
September 1946	2,284	2,969	1,722	1,658
Daily Averages :				
September 1947	107	142	64	80
August 1947	108	136	65	74
September 1946	*78*	*104*	*59*	*58*
Year 1946...	66	93	56	58
Year 1938...	138	187	139	161
	IN BALLAST*			
September 1947 :				
British	423	445	707	1,611
Foreign	243	424	1,255	1,243
Total :				
September 1947	666	869	1,962	2,854
September 1946	859	1,175	1,400	2,234
Vessels with passengers only :				
September 1947	35	133	56	176
September 1946	36	54	58	181
Vessels calling for or clearing with bunkers only :				
September 1947	93	188	965	1,512
September 1946	94	131	724	1,110
Other vessels :				
September 1947	538	548	941	1,165
September 1946	729	989	618	943
Daily Averages :				
September 1947	22	29	65	95
August 1947	23	34	68	102
September 1946	*29*	*39*	*47*	*74*
Year 1946...	35	45	47	83
Year 1938...	55	64	54	91

* The "cargo" figures include vessels loading or unloading mail only, while vessels recorded as "in ballast" include those embarking or disembarking passengers only or entering for, or clearing with, bunkers only as well as the normal ballast movement.

During the third quarter entrances and clearances of vessels in ballast totalled 2·91 and 8·92 million tons respectively. Ballast movement as a whole amounted to 60 per cent. of the combined total of entrances and clearances with cargo, compared with 45 per cent. in the year 1938. Considering British and foreign tonnage separately, movements of British vessels in ballast equalled 47 per cent. of entrances and clearances of British shipping with cargo, while for foreign tonnage the corresponding proportion was 93 per cent.

Vessels with Cargo

The total tonnage of vessels entering with cargo in the foreign trade in September established a new post-war record at 4·25 million tons net, the total being slightly above the previous peak in July and 4 per cent. higher on a daily average basis. Clearances (2·39 million tons net) were the highest since May 1940 and, on a daily average basis, exceeded the August total by 8 per cent. The daily average of entrances amounted to 76 per cent. of the 1938 average, but clearances were just under half the 1938 figure.

Mail Vessels : Entrances of vessels with mail only were about 4 per cent. of the total tonnage of entrances with cargo. Clearances amounted to some 7 per cent. of the total clearances with cargo.

Cargo (excluding Mail) : Entrances averaged over 135,000 tons daily, or 3 per cent. more than in August, reaching the highest figure since before the war, while clearances, which were nearly 74,000 tons a day on the average, rose by 8 per cent., compared with August, to the highest level since May 1940.

Vessels in Ballast

Vessels entering in ballast in September amounted to nearly 29,000 tons a day on the average. This was 16 per cent. lower than in August and the smallest figure for any month since February. The daily average of clearances (95,000 tons) was over 6 per cent. below the rather high average for August.

Vessels with Passengers only : Both entrances and clearances were lower than in the summer months, the declines compared with August being, on a daily average basis, 12 and 25 per cent. respectively.

Bunkers only : The recorded total of vessels calling for bunkers only was 188,000 tons, or 12 per cent. of the tonnage loading bunkers, compared with 13 per cent. in August and 10 per cent. in July. As in August, foreign tonnage was 86 per cent. of the total compared with 91 per cent. in July. The daily average tonnage of vessels clearing with bunkers only, about 50,000 tons, was a little lower than the peak August figure but otherwise was the highest recorded.

The quantities of coal and oil fuel shipped for the use of vessels engaged in the foreign trade and of fishing vessels were as follows :—

Fuel	1938	1946		1947	
	Monthly average	Monthly average	September	August	September
	Thousand tons				
Coal... ...	874	391	406	336	384
	Million gallons				
Oil fuel ...	26·1	33·5	28·9	40·3	45·6

The daily average of coal shipped for bunkering (12,800 tons) was, with the exception of February, the highest this year, but represented only 45 per cent. of the daily average for 1938. Bunker oil shipments (1,520,000 gallons on a daily average basis) were, with the exception of the July average, the highest so far recorded, and exceeded the 1938 average by 77 per cent.

Other Vessels in Ballast : Daily average entrances, 19 per cent. lower than in August, were the smallest since

Foreign Trade: Entrances and Clearances With Cargo.*

Thousand tons net

—	Entered				Cleared			
	1946	1947			1946	1947		
	Quarterly average	First quarter	Second quarter	Third quarter	Quarterly average	First quarter	Second quarter	Third quarter
	By Nationalities of Vessels							
British:								
Registered in United Kingdom... ...	5,240	5,829	6,784	8,071	3,562	3,582	4,009	4,937
„ „ Canada	168	87	171	203	50	17	13	22
„ „ Other Countries	81	83	62	66	96	79	96	87
Total British	5,489	5,999	7,017	8,340	3,708	3,678	4,118	5,046
Swedish...	410	322	356	424	167	97	82	79
Norwegian	406	305	345	479	151	133	150	139
Danish	173	191	220	291	170	107	136	177
Dutch	142	216	273	337	183	188	211	212
Belgian	98	121	217	293	106	121	206	278
French	68	47	89	120	82	59	94	128
Greek	52	24	48	139	23	10	13	19
United States of America	1,008	890	1,028	1,152	203	280	189	196
Panamanian	45	66	99	206	14	11	21	9
Other	113	124	216	390	100	87	104	142
Total Foreign	2,515	2,306	2,891	3,831	1,199	1,093	1,206	1,379
Total	8,004	8,305	9,908	12,171	4,907	4,771	5,324	6,425
	By Trading Areas							
1. (*a*) Eire	414	393	420	499	554	455	493	607
1. (*b*) Northern Europe (Foreign)... ...	1,307	1,328	1,887	3,000	1,227	994	1,273	1,557
2. Europe (Atlantic) and Western Mediterranean Countries	874	952	1,312	1,371	653	590	689	877
3. Central and Eastern Mediterranean Countries	204	325	332	297	307	230	216	248
4. West and South Africa	397	475	523	487	226	273	279	292
5. East Africa, Persian Gulf, India ...	753	626	685	766	497	512	555	529
6. Eastern Asia and Islands in the Pacific	116	203	246	182	167	247	205	280
7. Australasia	384	440	410	533	194	195	216	268
8. North America—Atlantic Coast ...	2,069	1,921	2,205	2,924	743	883	1,009	1,318
9. West Indies and Central America (Atlantic Coast)	946	773	992	1,238	108	109	130	135
10. South America—Atlantic Coast ...	272	407	388	421	188	239	212	229
11. South and Central America—Pacific Coast	42	33	21	37	21	24	26	35
12. North America—Pacific Coast	199	400	426	379	19	20	21	50
13. Other Areas	27	29	61	37	3	—	—	—
Total British Countries	2,983	3,063	3,391	3,850	1,935	1,851	2,022	2,480
Total Foreign Countries	5,021	5,242	6,517	8,321	2,972	2,920	3,302	3,945
Total	8,004	8,305	9,908	12,171	4,907	4,771	5,324	6,425

April 1944, while clearances were 8 per cent. below the rather high August figure.

Nationality of Vessels

The table above shows, for each principal nationality, the tonnage of vessels entering and clearing with cargo (excluding vessels loading or unloading mail only) in the third quarter of 1947, compared with the preceding two quarters and with the quarterly average for 1946.

Entrances with Cargo*: The tonnage of British vessels entered with cargo in the third quarter amounted to 8,340,000 tons, 19 per cent. more than in the previous quarter and the highest figure since the third quarter of 1939. Entrances of foreign tonnage rose by nearly one-third to 3,831,000 tons, all the principal foreign nationalities sharing in the advance. As in every quarter since the beginning of last year United States tonnage came first, at 1,152,000 tons; Norwegian was next in importance (479,000 tons). Greek entrances, which have been markedly low for over a year, showed a large increase to 139,000 tons, the highest figure since 1942, while Panamanian entrances, more than double the previous quarter's figure at 206,000 tons, were the biggest on record. German entrances, which were negligible until the second quarter, rose in the third quarter to 139,000 tons, a total greater than that for French entrances (120,000 tons).

Clearances with Cargo*: The tonnage of British shipping cleared with cargo in the third quarter was 5,046,000 tons, the highest total since 1940 and 23 per cent. above the figure for the second quarter of this year. Clearances of foreign vessels were also the highest since 1940, the total ,1,379,000 tons, exceeding that for the preceding quarter by 14 per cent. Notable increases were shown in Belgian, Danish and French tonnage, but only in the case of French vessels did the tonnage of clearances with cargo in the third quarter exceed the corresponding figure for entrances. Belgian clearances amounted to 95 per cent. of the tonnage of Belgian vessels entering with cargo, but for United States and Swedish shipping the corresponding figures were 17 and 19 per cent. respectively. Greek and Panamanian clearances were negligible, representing only 14 and 4 per cent. of the respective entrances.

Trading Areas

The second table above shows, for each trading area, the tonnage of vessels entering and clearing with cargo (again excluding vessels with mail only) in the third quarter of 1947, compared with the two preceding quarters and with the quarterly average for 1946.

Entrances with Cargo* from British countries (3,850,000 tons), the highest since 1940, were 14 per cent. above the total for the second quarter and nearly 30 per cent. higher than the 1946 average. Entrances from foreign countries (8,321,000 tons) were 28 per cent. higher than in the second quarter, the major part of the increase of 1,804,000 tons being accounted for by the rise in entrances from Northern Europe (Foreign) which, at 3,000,000 tons, were 59 per cent. higher than in the previous quarter and well over double

* Excluding vessels with mail only.

the 1946 average. They were followed closely by entrances from North America—Atlantic Coast, 2,924,000 tons or 33 per cent. more than in the second quarter. Entrances from all the other areas, with the exception of the less important South and Central America—Pacific Coast, were higher than for 1946. Notable increases compared with the previous quarter were shown for West Indies and Central America (Atlantic Coast) and Australasia, the totals in both cases being the highest since 1940. There were declines in four areas, including Eastern Asia and Islands in the Pacific, entrances from which (182,000 tons) were the lowest for a year.

Clearances with Cargo* to both British and foreign countries increased further to the highest totals since the second quarter of 1940. They rose for all areas, except one—East Africa, Persian Gulf, India, for which the second quarter's total had been comparatively high—and the figures for North America (Atlantic Coast), Northern Europe (Foreign), Eastern Asia and Islands in the Pacific and North America (Pacific Coast) were all the highest since 1939. Clearances to Europe (Atlantic) and Western Mediterranean countries were 27 per cent. greater than in the second quarter and those to Australasia were 24 per cent. up; in both cases the totals were the highest since 1940.

Arrivals and Departures

The table below shows the arrivals and departures of vessels with cargo in the foreign and coasting trades.

Daily average arrivals with cargo in the foreign trade in September, 155,000 tons net, or 13,000 tons greater than the daily average of entrances, were 6 per cent. higher than in August, and represented 65 per cent. of the 1938 average. Daily average departures, 91,000 tons net, 11,000 tons more than average clearances, were 7 per cent. higher than in August and amounted to 48 per cent. of the 1938 average. Arrivals and departures in the coasting trade, on a daily average basis, were the highest since August 1939 and both exceeded the 1938 averages by some 5 per cent.

Arrivals and Departures with Cargo

Month	Foreign trade		Coasting trade	
	Number	Thous. tons net	Number	Thous. tons net
	Daily averages			
Arrivals—				
September 1947 ...	113	155	283	82
August 1947 ...	114	146	271	77
September 1946 ...	*81*	*110*	*246*	*72*
Year 1946	68	100	230	66
Year 1938	159	238	277	78
Departures—				
September 1947 ...	68	91	280	83
August 1947	69	85	270	79
September 1946 ...	*62*	*65*	*240*	*71*
Year 1946	59	64	229	66
Year 1938	151	189	273	79

* Excluding vessels with mail only.

Shipping Activity at Ports: In the table below monthly figures of arrivals and departures of vessels in the foreign trade are grouped according to port areas, while the tables on the next page show arrivals and departures at principal ports of vessels in the foreign and coasting trades, respectively, during the last two quarters compared with the quarterly average for 1938.

Arrivals with Cargo in the foreign trade in September were 111,000 tons more than in August, but the increase was not equally distributed among the port areas. Arrivals at East Channel ports and the West Coast of Scotland fell by 12 and 14 per cent. respectively, while those at Fishguard and North Wales were nearly 40 per cent. less than in August. A further rise took place in arrivals at the Thames area and Humber ports, the totals in both cases being the highest since August 1939, and, after setbacks in August, the tonnages arriving at West Channel ports, and the North-east Coast were also the greatest since before the war.

Arrivals with cargo at the principal ports during the third quarter were generally higher than in the preceding quarter. Arrivals at London rose by over 20 per cent. to 2,947,000 tons, and at Glasgow by 52 per cent. to 621,000 tons. Here the figure for the second quarter had been depressed by the dock strike. Nevertheless, arrivals at London during the quarter equalled only 61 per cent. and those at Glasgow 60 per cent. of the 1938 averages. Arrivals at Tyne ports (420,000 tons) were 45 per cent. higher than in the preceding quarter and represented just over 80 per cent. of the 1938 average. Arrivals at Southampton increased by 28 per cent. to 1,356,000 tons, 66 per cent. of the quarterly average for 1938. Other ports at which notable increases were recorded included Dover, Harwich, Hull and Bristol.

Departures with Cargo from West Channel ports in September (545,000 tons) or 12 per cent. higher than in August and more than double the average for 1946, reflected the increased activity of large liners in the trans-Atlantic traffic. The total for the month was the highest since before the war. Departures from the Bristol Channel and Humber ports were in each case about 50 per cent. higher than in August and those from the Mersey and North-west Coast (554,000 tons), were the highest since mid-1940. Some decline from the relatively high figures for July and August took place in departures from East Channel ports and from Fishguard and North Wales. Among the principal ports Swansea, Plymouth and Folkestone were the only ones from which departures with cargo in the foreign trade were less in the third quarter of 1947 than in the preceding quarter. From London departures were 1,467,000 tons, 16 per cent. more than in the second quarter, and increases of 28 and 18 per cent. in departures from Southampton and Liverpool brought the totals for these ports to 1,275,000 tons and 1,289,000 tons respectively, a little less than two thirds of the 1938 average in each case. Departures from Glasgow, 462,000 tons, were 74 per cent. greater than in the previous quarter, when the total was low on account of the dock strike which began in March. A jump of 37 per cent. brought departures from Dover to 608,000 tons, a total more than three times as great as that for the corresponding

(*Continued at foot of page* 1894)

Foreign Trade: Arrivals and Departures at Port Areas

Thousand tons net

Area	Total tonnage			Arrivals with cargo			Departures with cargo		
	July 1947	August 1947	September 1947	July 1947	August 1947	September 1947	July 1947	August 1947	September 1947
East Coast of Scotland	412	423	362	173	185	184	57	48	19
North-east Coast	859	837	871	321	288	327	161	134	152
Humber ports	917	801	799	344	346	355	80	69	105
Thames area	2,669	2,691	2,717	1,118	1,122	1,190	642	620	613
East Channel ports*	720	749	645	295	321	284	292	302	274
West Channel ports	1,971	2,179	2,164	573	529	601	435	487	545
Bristol Channel	1,085	1,008	1,100	439	387	430	143	115	172
Fishguard and North Wales	197	271	167	94	132	82	94	132	80
Mersey and North-west Coast	2,228	2,281	2,212	945	952	933	542	525	554
West Coast of Scotland	700	704	632	264	240	207	145	171	181
Northern Ireland and Isle of Man ...	128	104	119	39	34	54	24	25	21
Total British vessels	8,034	8,167	7,890	3,104	3,195	3,151	2,065	2,057	2,115
Total Foreign vessels	3,852	3,881	3,898	1,501	1,341	1,496	550	571	601
Total	11,886	12,048	11,788	4,605	4,536	4,647	2,615	2,628	2,716
Monthly average 1946	9,401			3,028			1,942		
Monthly average 1938	20,327			7,233			5,750		

* East of Portsmouth.

Foreign Trade : Arrivals and Departures at Principal Ports

Thousand tons net

Port	Arrivals						Departures					
	With cargo			With cargo and in ballast			With cargo			With cargo and in ballast		
	1938	1947		1938	1947		1938	1947		1938	1947	
	Quarterly average	Second quarter	Third quarter	Quarterly average	Second quarter	Third quarter	Quarterly average	Second quarter	Third quarter	Quarterly average	Second quarter	Third quarter
Bristol	726	481	572	734	484	577	117	82	88	579	392	460
Cardiff	304	243	265	914	414	357	884	62	75	1,421	547	543
Dover	746	438	612	945	565	652	812	443	608	946	555	653
Falmouth (inc. Truro)	32	8	39	301	424	555	1	0	9	408	492	626
Folkestone... ...	225	171	162	275	181	267	232	157	148	274	181	268
Grimsby (inc. Immingham)...	203	149	200	381	311	291	297	25	29	443	341	349
Harwich	642	288	401	681	504	684	626	288	405	681	501	690
Holyhead	329	173	185	361	173	185	297	173	185	360	173	185
Hull	1,280	593	760	1,355	1,053	867	465	172	190	1,188	1,023	842
Liverpool	2,797	2,028	2,052	3,659	2,418	2,546	1,956	1,091	1,289	3,380	2,343	2,561
London	4,842	2,409	2,947	5,630	2,859	3,368	2,439	1,265	1,467	5,104	2,685	3,185
Manchester (inc. Runcorn) ...	816	570	647	884	601	694	326	221	256	724	541	614
Middlesbrough ...	320	272	342	481	327	437	418	173	191	548	378	486
Newhaven... ...	169	107	117	193	112	125	165	102	111	193	111	128
Newport (Mon.) ...	72	97	128	244	166	159	401	124	124	459	253	262
Plymouth	1,037	110	171	1,374	163	247	124	44	30	1,352	164	244
Southampton ...	2,058	1,057	1,356	2,880	1,587	2,114	1,947	996	1,275	2,895	1,637	2,155
Swansea	206	116	203	527	245	300	612	148	127	742	303	327
Tyne ports ...	518	289	420	1,254	440	552	1,036	173	239	1,556	572	709
Glasgow	1,027	409	621	1,225	564	729	934	265	462	1,227	640	901
Grangemouth ...	237	152	192	271	170	227	80	38	42	172	106	194
Greenock	256	49	48	617	90	130	157	16	24	616	99	150
Leith	245	125	138	323	221	179	199	47	57	329	231	154
Belfast	461	115	126	889	175	180	337	57	68	837	169	166
Other ports ...	2,150	821	1,084	4,030	998	1,290	2,387	344	460	4,118	899	1,157
Total ...	21,698	11,270	13,788	30,428	15,245	17,712	17,249	6,506	7,959	30,552	15,336	18,009

Coasting Trade : Arrivals and Departures at Principal Ports

Thousand tons net

Port	Arrivals						Departures					
	With cargo			With cargo and in ballast			With cargo			With cargo and in ballast		
	1938	1947		1938	1947		1938	1947		1938	1947	
	Quarterly average	Second quarter	Third quarter	Quarterly average	Second quarter	Third quarter	Quarterly average	Second quarter	Third quarter	Quarterly average	Second quarter	Third quarter
Blyth	3	1	2	508	540	503	406	529	485	428	532	489
Bristol	109	116	90	249	320	446	95	125	181	386	423	613
Cardiff	46	52	40	916	637	691	225	275	252	396	453	524
Cowes	263	654	936	746	669	1,028	228	618	897	744	667	1,031
Hartlepool... ...	1	2	1	212	191	177	162	173	156	199	193	180
Hull	85	38	27	215	158	121	147	103	83	354	171	151
Lancaster	187	113	152	247	120	165	177	116	148	248	126	165
Liverpool	497	487	531	748	720	759	519	476	540	1,082	918	948
London	1,838	1,826	1,733	2,064	2,079	2,131	536	257	280	2,671	2,198	2,297
Middlesbrough ...	29	33	40	265	167	183	96	45	38	201	152	123
Newport (Mon.) ...	37	37	33	339	223	219	46	59	50	120	127	124
Portsmouth ...	136	132	135	613	505	683	66	44	55	617	503	685
Southampton ...	167	202	263	488	540	602	134	241	264	484	521	590
Sunderland ...	23	22	21	542	430	367	409	378	368	462	423	415
Swansea	32	36	32	318	199	164	50	68	62	107	119	138
Tyne ports ...	106	64	54	1,029	933	937	527	698	726	723	826	817
Aberdeen	183	119	124	187	126	130	125	67	78	211	135	145
Glasgow	214	140	271	418	402	553	202	179	250	382	346	374
Leith	134	57	68	231	97	91	177	65	52	221	106	85
Stranraer	124	110	132	131	119	147	123	111	144	131	114	147
Belfast	887	805	903	1,001	853	1,068	708	587	692	1,057	885	1,109
Other ports ...	2,030	1,668	1,761	4,302	3,196	4,064	2,024	1,502	1,589	4,430	3,173	4,046
Total ...	7,131	6,714	7,349	15,769	13,224	15,229	7,182	6,716	7,390	15,654	13,111	15,196

Registrations of British and Foreign Films

THE following are details of films registered by the Board of Trade under the Cinematograph Films Act, 1938, during the week ended Tuesday, October 28, 1947 :—

Title of Film	Registered in the Name of	Maker's Name	Registered No.	Length (feet)	Date of Registration
	BRITISH				
And So To Work No. 3	Columbia Pictures Corp., Ltd.	Leslie Laurence Productions, Ltd.	Br/R 10795	1,536	October 22
And So To Work No. 5	,, ,,	,, ,,	Br/R 10796	1,420	October 22
A Scrap of Paper	,, ,,	Paul Barralet Productions, Ltd.	Br/R 10804	1,529	October 24
Birthplace of Fame	Exclusive Films, Ltd. ...	Films of Great Britain, Ltd.	Br/R 10806	1,498	October 28
Taken For Granted	Twentieth Century-Fox Film Co., Ltd.	World Wide Pictures, Ltd.	Br/R 10807	1,618	October 28
1,000 Million a Year	,, ,,	Anglo-Scottish Pictures, Ltd.	Br/R 10816	1,360	October 28
Country Policeman	,, ,,	Merlin Film Co., Ltd. ...	Br/R 10817	1,604	October 28
	FOREIGN				
Lost City of the Jungle (Serial) :—					
Episode 1.—*Himalaya Horror* ...	General Film Distributors, Ltd.	Universal International Films, Inc.	F 10797	1,992	October 22
Episode 2.—*Death Flood*	,, ,,	,, ,,	F 10798	1,808	October 22
Episode 3.—*Wave Length for Doom* ...	,, ,,	,, ,,	F 10799	1,717	October 22
Christmas Eve	United Artists Corp., Ltd.	Miracle Productions, Inc.	F 10800	8,073	October 22
Donald's Dilemma	RKO Radio Pictures, Ltd.	Walt Disney Productions, Inc.	F 10801	671	October 22
Bataille du Rail	Film Traders, Ltd. ...	Co-operative Generals Du Cinema Francais	F 10802	7,900	October 24
Partie de Campagne	,, ,,	Pantheon (Societe du Cinema du) S.A.R.L.	F 10803	3,700	October 24
Behind These Walls	Associated British Film Distributors, Ltd.	Byron Pictures, Ltd. ...	F 10805	8,654	October 27
A Volcano is Born	Twentieth Century-Fox Film Co., Ltd.	Twentieth Century-Fox Film Corp.	F 10808	814	October 28
Nymphs of the Lake	,, ,,	,, ,,	F 10809	777	October 28
Mexican Baseball	,, ,,	,, ,,	F 10810	581	October 28
Song of Sunshine	,, ,,	,, ,,	F 10811	707	October 28
Memories of Columbus	,, ,,	,, ,,	F 10812	758	October 28
Magic of Youth	,, ,,	,, ,,	F 10813	745	October 28
Happy Go Lucky	,, ,,	,, ,,	F 10814	580	October 28
The Crimson Key	,, ,,	,, ,,	F 10815	6,834	October 28

(Films, the titles of which are in italics, are parts of a serial.)
Br/R indicates " for the exhibitors' and renters' quotas."

THE DEVELOPMENT AREAS TO-DAY

THE ARTICLES ON THIS SUBJECT which appeared recently in the *Board of Trade Journal* are now available in booklet form.

The booklet, which contains over 80 photographs of new factory buildings and post-war industrial activity, gives a survey of factory building progress from V.E.-Day to June this year in the four main Development Areas:

SOUTH WALES THE NORTH-EAST
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Shipping at U.K. Ports

(*Continued from page* 1892)

quarter of 1946, and departures from Harwich and Tyne ports were 41 and 38 per cent. higher, respectively, than in the second quarter of this year.

Definitions

Certain of the terms used in this article require some further explanation.

(1) The foreign trade statistics relate to voyages direct from any port abroad to a port in the United Kingdom, or vice versa, or from one port to another in the United Kingdom, so long as the vessel has on board cargo shipped abroad, or shipped in the United Kingdom for discharge abroad, or passengers from or for a port outside the United Kingdom.

The coasting trade statistics include vessels carrying only coastwise cargo and/or passengers from port to port in the United Kingdom, or when moving between such ports without at the time having on board cargo or passengers from or for a port abroad. Thus the coastwise movement in ballast includes foreign trade vessels which, having completed the discharge of cargo or passengers from abroad at one United Kingdom port, proceed coastwise to another port to load for the return voyage.

(2) The cargo figures relate to vessels which actually load or unload merchandise (other than Government Stores), bullion, specie or mail (but not solely bunkers, ships' stores or passengers). The ballast figures relate to all other vessels and include vessels loading or unloading only Government Stores, i.e., for arrivals, goods returned from the Military, Naval and Air Forces abroad and captured enemy military equipment; and for departures, goods shipped by a United Kingdom Government Department for the use of Government Forces abroad.

(3) Vessels in the foreign trade, calling during the course of a single voyage at more than one port of the United Kingdom, are recorded as entered and cleared at one port only, but as arrived and departed at each port.

Supplies of Consumer Goods Affected by Holidays in August

CONSUMER goods available for the home civilian market were less in August for most of the classes for which the Board of Trade publishes figures. The following table shows the changes in supplies of certain items for the month of August, or for longer periods including August, compared with the previous period and with last year.

Commodity	Comparison of principal items with	
	Previous Period per cent. change	A year ago
Footwear (adjusted)	− 6	+17
Hosiery	+ 6	+22
Cloth : wool	—13	— 2
non-wool	—10	no change
Hand knitting yarn	—17	+ 4
Wool blankets (August)	— 5	—13
Other household textiles	— 2	+ 9
Utility furniture	—22	—19
Floor coverings	+13	+26
Hollow-ware	—33	—55
Prams and folders	—15	+15
Push chairs	—22	—38
Tobacco clearances	—11	—25

Figures are also given below for insertion in the tables published in the *Board of Trade Journal* for October 4.

Index Numbers

The index number for footwear for July/August fell by 2½ per cent. The figures for non-rubber boots and shoes included in this index are adjusted to take account of the number of working days.

It is interesting to note that for May/June the final index for other clothing was at the same level and the provisional index for furniture and furnishings was 3 per cent. higher than the corresponding earlier peaks which occurred in September/October last year.

The fall in the index for hardware in March/April was due to a sharp fall in supplies of household electrical goods and a lesser decline in domestic hollow-ware.

Annual Rates of Supply

For insertion in the Main Tables published in the *Board of Trade Journal* for October 4, 1947 :—

Table	Sub-heading	Period	Reading across the columns for additional figures
(Index)			
I	Footwear ...	July/Aug.	156
	Other clothing	May/June	146
	Furniture and furnishings	May/June	248 (prov.)
	Hardware ...	Mar./April	167
II	(*a*) Non-rubber	August ...	22·1, 3·5, 38·6, 4·1, 8·0, 8·4, 0·6, 14·5, 2·7, 12·6, 1·2, 1·00, 96·3, 6·0, 15·0, 117
	(*b*) Rubber ...	August ...	1·99, 3·94, 14·14
III	(*a*) Under- and outer-wear	July/Aug.	5·4, 14·5, 14·2, 10·1, 24·1, 18·7, 8·4, 9·5, 7·5, 2·2, 5·4, 0·4, 10·0, 20·9
	(*b*) Socks and stockings	July/Aug.	62·7, 127·6, 49·4, 176·9, 4·9, 1·7, 23·3, 47·7
IV	Gloves ...	1946 ...	Total 23·98 (amended).
V	Woven wool cloth	August ...	168, 49, 217
	Non-wool cloth	July/Aug.	97, 79, 137, 20, 48, 12, 61
		August ...	151 (Linings, etc.), 331, 402, 125, 172, 574
VII	Nursery squares	July/Aug.	23·5
	Sanitary towels	July ...	1081
		August ...	901
IX	Wool blankets	July/Aug.	4·8, 0·54
	Other household textiles	July/Aug.	6·8, 0·6, 5·0, 4·8, 15·1, 21·6, 1·4, 3·0, 11·7, 13·1, 21·3
XI	Furniture ...	August ...	389, 773, 492, 214, 277, 370, 1752, 46, 88, 197, 1711, 376, 42, 135, 9, 33914, 39001, 204, 29, 130
XII	Floor coverings	June to Aug.	24·0, 33·9, 12·29, 18·15, 1·79
XIII	Prams, etc. ...	August ...	576. 416
	Pedal cycles ...	Apr. to June	955, 115
XIV	Kettles, irons...	Jan. to Mar.	706, 1928
	Vacuum cleaners	Jan. to Mar.	588
	Water heaters, etc.	April/May	40, 251, 488, 1086, 496, 78, 141
XVII	Hollow-ware ...	August ...	2·36, 2·59, 3·84, 6·28, 1·10, 1·86, 5·08
XX	Pencils, etc. ...	May to July	64·1, 57·6, 24·6, 4·4
	Wedding rings	Apr. to June	0·46
XXII	Tobacco ...	July ...	212
		August ...	189
	Lighters ...	August ...	2·73, 0·44
XXIII	Toys	May to July	1907, 1405, 4326, 916
	Indoor games...	May to July	0·02, 63, 243, 1·98, 248, 6405, 150, 777, 113, 91, 5056, 1442
XXIV	Sports equipment ...	May to July	234, 305, 250, 1700, 54, 61, 196, 300, 3133, 9317, 280

£240,000,000

This is the yearly figure by which the engineering and allied industries must increase their exports by the end of 1948.

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Sales of Surplus R.A.F. Equipment

ANNOUNCEMENT was made in the *Board of Trade Journal* of September 13, of a series of auction sales to be held by the Ministry of Supply at certain R.A.F. Maintenance Units.

A further series of auction sales, beginning this month, and continuing over the next few months, is now being arranged by the Ministry of Supply at the undermentioned R.A.F. Maintenance Units.

255	Maintenance	Unit,	Fulbeck, Grantham, Lincs.
259	,,	,,	Peterborough, Northants.
260	,,	,,	Errol, Perthshire.
261	,,	,,	Morpeth, Northumberland.
262	,,	,,	Eccles, Norwich, Norfolk.
263	,,	,,	Stansted Mountfitchett, Essex.
264	,,	,,	Abbotts Ripton, Huntingdon.
265	,,	,,	Grove, Wantage, Berkshire.
268	,,	,,	Marston Moor, Yorkshire.

The various auctions will, of course, be advertised in the usual manner, e.g., by posters, in the Press and the *Board of Trade Journal*, but there is a special point of interest in relation to these depots. As the sites have to be entirely cleared of equipment, the range of goods to be offered will be wide and diversified. With few exceptions the entire range of stores used by the Royal Air Force will be offered for sale. This includes tools, bicycles, workshop equipment, aircraft ground equipment, all sorts of electrical equipment, radio and radar equipment, wiring equipment, cable, wire and insulating materials, aircraft generators and motor turbines, aircraft instruments, camera and photographic equipment, gaseous apparatus, tentage, aircraft dinghies, wheel equipment, aircraft engine spares, aircraft frames, Aeronautical General Stores (screws, nuts, bolts, etc.) and generating sets (below 10 K.V.A.).

No reserve is placed on any item and the Auctioneers will forward catalogues on request.

Details of the sales, dates, names of auctioneers, etc., will be published in advance in the *Board of Trade Journal*. Any further information required regarding the sales at the above sites can be obtained from the Ministry of Supply, Directorate of Disposals (A) 4A, Room 1064, Thames House South, Millbank, London, S.W.1. (Telephone FRAnklin 2211, Extensions 3330 and 1685.)

Statistical Abstract for the British Commonwealth

The 69th number of the Statistical Abstract of the British Commonwealth is now on sale and may be obtained through any bookseller or direct from H.M. Stationery Office, Kingsway, London, W.C.2, and branches, price 4s. 0d. The present number, which is the first since 1938, contains statistics of the trade of each country in the Commonwealth for each of the ten years 1936 to 1945. The methods of classification of trade commodities and the scope of the statistics are explained in a Preface.

The Summary included in the Abstract for the Commonwealth as a whole records that the overall value of trade in 1945 was £3,168 million, of which 67·5 per cent. represented trade with foreign countries and 32·5 per cent. trade between the member countries of the Commonwealth. Although the value of trade has considerably increased in recent years, the division between foreign and British countries for 1945 was substantially the same as before the war, the trade within the Commonwealth representing 31·5 per cent. of the total in 1937 and 33·3 per cent. in 1938.

A new feature of the Abstract, which should considerably enhance its value to students of Commonwealth affairs, is a series of introductory notes to each country or group of countries setting out some of the salient facts relating to the economic situation of the territory. These notes give particulars of the area, population and agricultural, mineral and manufacturing production in a concise and readable form and provide a useful background to the more detailed statistics of trade. The impact of the war on the economy of British countries is well illustrated in the statistics and, although the year 1945 was one of only partial recovery, the potential wealth and possibilities for expansion in many parts of the Commonwealth can be readily assessed from the information presented in the volume. The Abstract constitutes a handy reference book for all those interested in the economic development of the British Commonwealth.

Ministry of Supply Auction Sales

AT the two day auction sale to be held at the Ministry of Supply Depot No. 107, Upper Hatton, Staffordshire, on November 12 and 13, a quantity of plant and stores will be on offer. The items to be sold include gas producing plants, evaporative coolers, electric motors, ¼ to 100 h.p. transformers, rectifiers, voltage regulators, control boards, electric welding plant, battery chargers, fans, electric furnaces, motor generating sets, vacuum pumps, air compressors and pneumatic tools, stationary engines and water pumps, salt bath furnaces, turntable, stacking and lifting warehouse trucks, hand tools, first aid A.R.P. equipment, bedding and blankets.

A wide variety of stores and equipment will be on offer at the auction sale to be held at M.O.S. Depot No. 68, West Bromwich, nr. Birmingham, on November 19 to 21. Among the items to be auctioned will be over 50 Avery's standard platform scales, 7 motorized centrifugal pumps, motorized potentiometer complete with meters and equipment, 7 industrial radiators Coventry Climax, 2 dust extracting cabinets, 3 Marsden dehydrators complete with motors and blowers, Alfa Laval portable centrifugal oil purifier, pulley blocks and trolleys.

Further details of these and other sales will be found in the list below. Catalogues, which will permit admission on all view days in addition to admission to the sale, can be obtained from the Auctioneers, price sixpence.

Date	Stores	Location	Auctioneer
Oct. 27–Nov. 6	Vehicles, etc.	M.O.S. Depot, Ruddington, nr. Nottingham.	Richardson & Linnell, St. James Sale Rooms, Derby. (Tel.: Derby 45641 and 47405.)
Oct. 27–Nov. 7	Miscellaneous stores	M.O.S. Depot, Thorp Arch, nr. Wetherby, Yorks.	Bartle & Sons, 5/6 Corn Exchange, Leeds, 1. (Tel.: Leeds 24628.)
Nov. 4–5 ...	Miscellaneous stores	R.A.F. M.U. No. 16, Sandon Road, Stafford.	South & Stubbs, Bank Passage, Stafford. (Tel.: Stafford 82.)
Nov. 4–6 ...	Vehicles, etc.	M.O.S. Depot, Elstow, nr. Bedford ...	W. & H. Peacock, 10 Lime Street, Bedford. (Tel.: Bedford 3115.)
Nov. 4–13 ...	Miscellaneous stores	M.O.S. Depot, Ashchurch, Glos. ...	Bruton Knowles & Co., King Street, Glos. (Tel.: Glos. 2267). Geo. Hone, High Street, Tewkesbury. (Tel.: Tewkesbury 10.)
Nov. 10–14 ...	Miscellaneous stores	M.O.S. Depot 151, Wing Airfield, nr. Aylesbury, Bucks.	W. Browne & Co., Market Square, Aylesbury, Bucks. (Tel.: Aylesbury 36.)
Nov. 11–12 ...	Radio and radar stores ...	M.O.S. Depot 877, L.P.T.B., Watford By-Pass, Aldenham.	Goddard & Smith, 22 King Street, St. James's, S.W.1. (Tel.: Whitehall 2721.)
Nov. 12–13 ...	Miscellaneous stores	M.O.S. Depot 107, Upper Hatton, Swynnerton, Staffs.	Heywood & Sons, Ironmarket, Newcastle-under-Lyme, Staffs. (Tel.: Newcastle-under-Lyme 67343/4.)
Nov. 13 ...	Electrical and radio equipment	M.O.S. Depot 905, Tamebridge, Walsall	Fox & Harrison, 51 Lower Hall Lane, Walsall. (Tel.: Walsall 3112/3.)
*Nov. 17 ...	Miscellaneous R.A.F. stores and cycles	R.A.F. M.U. No. 262, Eccles, Norwich, Norfolk.	Gaze & Son, Crown Street, Diss, Norfolk. (Tel.: Diss 13.)
Nov. 17–20 ...	Hand tools, etc.	M.O.S. Depot, Marshlock Factory, Henley-on-Thames.	Henry Butcher & Co., 73 Chancery Lane, W.C.2. (Tel.: Holborn 8411.)
Nov. 18–19 ...	Miscellaneous R.A.F. stores ...	R.A.F. M.U. No. 61, Handforth, Wilmslow, Manchester.	Brady & Son, 17 Warren Street, Stockport. (Tel.: Stockport 2252/3.)
Nov. 18–20 ...	Miscellaneous R.A.F. stores ...	R.A.F. M.U. No. 25. Hartlebury, Kidderminster.	Nock & Joseland, Bank Buildings, Kidderminster. (Tel.: Kidderminster 2053.)
*Nov. 18–20 ...	Miscellaneous stores	M.O.S. Depot 123, Norton Fitzwarren, Taunton.	F. L. Hunt & Sons, 9, Hammet Street. A. W. Parker & Co., 53 East Street. W. R. J. Greenslade & Co., 3 Hammet Street. (Tels.: Taunton 2743, 2101 and 2601.)
Nov. 19–21 ...	Miscellaneous stores	M.O.S. Depot 68, West Bromwich, Staffs.	Taylor & Taylor, 90 Edgbaston Road, Smethwick, Birmingham. (Tel.: Smethwick 1174/5.)
*Nov. 20–21 ...	Miscellaneous stores	M.O.S. Depot 150, Ramsbury Airfield, Ramsbury, Wilts.	Hooper Pinniger & Co., 130 High Street, Marlborough, Wilts. (Tel.: Marlborough 41.)
Nov. 25–26 ...	Miscellaneous R.A.F. stores ...	R.A.F. M.U. No. 35, Heywood, Lancs.	C. W. Provis & Sons, 2 Booth Street, Manchester 2. (Tel.: Manchester Central 2800.)
Nov. 25–28 ...	Miscellaneous R.A.F. stores ...	R.A.F. M.U. No. 3, Milton, Abingdon, Berks.	Adkin, Belcher & Bowen, 10 High Street, Abingdon. (Tel.: Abingdon 25.)
Nov. 25–28 ...	Miscellaneous stores	M.O.S. Depot 156, R.N. Depot, Topeham Road, Exeter.	Rippon, Boswell & Co., 8 Queen Street, Exeter. (Tel.: Exeter 3204.)
*Nov. 26–28 ...	Miscellaneous stores	M.O.S. Depot 47, Bristol Tramways, Bristol, Glos.	Young & Howes, 73 Queen Street, Bristol 1. (Tel.: Bristol 26336.)
Nov. 26–Dec. 3	Vehicles, etc.	M.O.S. Depot, Mount Farm, Dorchester, nr. Oxford.	Simmons & Sons, 12 Station Road, Reading. (Tel.: Reading 4025.)
*Late Nov. ...	Miscellaneous R.A.F. stores ...	R.A.F. M.U. No. 260, Errol, Perth ...	Hay & Co., Perthshire Stock Market, Perth. McDonald Fraser & Co., Perth Auction Market, Perth.

*Dates not firm.

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Reports on Technique of German and Japanese Industry

AN additional sixteen reports on Germany's war-time industrial technique are published to-day. Two further reports on Japanese industry received from Washington are also put on sale.

Reports may be seen at the Principal Public Libraries, Chambers of Commerce, Universities, Professional and Scientific Institutions and Trade Associations. A limited number of copies are available for purchase at the Sales Offices of His Majesty's Stationery Office or may be ordered by post from the *Cashier, H.M.S.O., P.O. Box* 569, *London, S.E.*1.

Canadian subscribers should apply to the Liaison Office, National Research Council, Ottawa.

A considerable volume of other information of industrial or technical interest, unsuitable for publication, may be consulted by arrangement with *T.I.D.U. German Division, Board of Trade*, 40 *Cadogan Square, S.W.*1.

No. of Report.	Title.	Price.
BIOS 1210	*Chemisch—Physikalische Versuchs Anstalt der Marine—Kiel—Germany, Fuels, Lubricants and Organization.*	3s. 6d. (post free 3s. 8d.)
BIOS 1315	*German Hard-Paste Porcelain and Earthenware Table-Ware Industries.*	14s. 0d. („ „ 14s. 4d.)
BIOS 1504	*Industrial Applications of Ultrasonics*	3s. 6d. („ „ 3s. 8d.)
BIOS 1515	*German Jewellery Industry*	2s. 0d. („ „ 2s. 2d.)
BIOS 1542	*Wartime Development in the Design of Pumps, Vacuum Pumps, Compressors, Steam Traps.*	1s. 6d. („ „ 1s. 7d.)
BIOS 1547	*Manufacture of Chalks, Crayons and Pastels in Germany*	4s. 0d. („ „ 4s. 2d.)
BIOS 1550	*Sheathing of Cables with Aluminium*...	2s. 6d. („ „ 2s. 8d.)
BIOS 1551	*German Floor Tile Factories with further information on Glazed Wall Tile and Sanitary Industries.*	10s. 0d. („ „ 10s. 3d.)
BIOS 1553	*German Provender Milling and Seed Cleaning*	2s. 6d. („ „ 2s. 8d.)
BIOS 1565	*The Manufacture of Laminated Tubes, Cylinders and Sheets and Insulated Sleevings at Elektro-Isolier-Industrie M.B.A.*	1s. 0d. („ „ 1s. 1d.)
BIOS 1568	*German Wooden Door Industry*	3s. 0d. („ „ 3s. 2d.)
BIOS 1582	*"Iganil" Aniline-Formaldehyde Resin*	1s. 3d. („ „ 1s. 4d.)
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FIAT 977	*Colour Reproduction by Colour Photography*...	6s. 0d. („ „ 6s. 2d.)
FIAT 1005	*The Niers Sewage Disposal Process*	3s. 6d. („ „ 3s. 8d.)
FIAT 1107	*The Manufacture of Ethylene by Reduction of Acetylene*	2s. 6d. („ „ 2s. 8d.)
BIOS/JAP/PR/1467 ...	*Metallurgical Examination of a Japanese Sakae-21 Aircraft Engine*	9s. 0d. („ „ 9s. 3d.)
BIOS/JAP/PR/1564 ...	*Organization, Administration and Facilities of the I.J.N. Medical Corps.*	5s. 0d. („ „ 5s. 2d.)
CLASSIFIED LIST No. 8	Consolidated List under subject headings of all reports on German and Japanese Industry published up to and including May 31st, 1947.	1s. 0d. („ „ 1s. 3d.)
CLASSIFIED LIST No. 9	June 1947, supplement to the above list	0s. 2d. („ „ 0s. 3d.)
CLASSIFIED LIST No. 10	July 1947, supplement to the above list	0s. 2d. („ „ 0s. 3d.)
TECHNICAL INDEX ...	Alphabetical Subject Index of Reports on German Industry published up to and including July 27, 1946.	5s. 0d. („ „ 5s. 3d.)
TECHNICAL INDEX ... (Part 2)	August, September and October, 1946, supplement to the above index.	1s. 6d. („ „ 1s. 7d.)
TECHNICAL INDEX ... (Part 3)	November and December, 1946, supplement to the above index ...	1s. 6d. („ „ 1s. 7d.)

An erratum to B.I.O.S. 275 has been issued and is available at the Sales Offices of H.M. Stationery Office.

Further reports, as they become available for publication, will be notified in the *Board of Trade Journal* and will also then be available for reference at the principal public libraries and Chambers of Commerce.

German Patent Specifications, accepted by the Berlin Patent Office during the war, can be seen at the Patent Office Library, 25 Southampton Buildings, Chancery Lane, London, W.C.2. Photographic copies of any specification and drawings may be obtained at the rate of 6d. per page.

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Official Announcements

Lactic Casein Prices: The Board of Trade announce that from November 1, 1947, the selling prices of lactic casein, distributed through the agency of the Lactic Casein Importers' Association, Limited, 23 St. Swithin's Lane, London, E.C.4, will be as follows:—

Mesh	1 *Ton and over*	*Under* 1 *ton*
90	£195	£200
60	£190	£195
30	£190	£195
Soluble	£200	£205

For quantities of under one bag the price is 4s. 6d. per kilo.

All the above prices are net ex warehouse.

★

Cotton Yarn Export Scheme—Period IV, 1947: The Board of Trade announce that the remainder of the Cotton Yarn export allocation for Period IV, 1947, is being made immediately. A partial allocation for Period I, 1948, is being made simultaneously.

★

Timber Control: The Timber Control announces that Mr. S. C. Rasmusen, who joined the Control in October 1939, has retired from the post of Assistant Controller in the Plywood Department.

★

Imports of Fluorspar: The Import Licensing Department of the Board of Trade announce in Notice to Importers No. 268 that with effect on October 28, 1947, fluorspar has been deleted from the list of goods which may be imported without individual licence from any country. As a consequence individual licences to import this commodity will be required as from that date.

TREASURY

Import Duties Orders: The Treasury have made the Import Duties (Drawback) (No. 10) Order, 1947, which increases the rate of drawback in respect of solid insoluble quebracho extract used in the manufacture of certain soluble quebracho extract and blends of this substance, from 2s. 9d. per cwt. to 4s. 3d. per cwt.

The Order which came into operation on October 27, 1947, is published by H.M. Stationery Office as Statutory Rules and Orders, 1947, No. 2236.

The Treasury have also made the Import Duties (Drawback) (No. 11) Order, 1947, which increases the rate of drawback in respect of linseed oil used in the manufacture of certain classes of goods, from £4 per ton to £25 per ton.

The Order which came into operation on October 30, 1947, is published by H.M. Stationery Office as Statutory Rules and Orders, 1947, No. 2258.

MINISTRY OF FOOD

Private Importation of Canned Meats: The Minister of Food announces that limited quantities of canned meats may now be imported under individual licence from the following European countries, viz.: France, Denmark, Holland, Norway, Hungary, Czechoslovakia, Poland, Yugoslavia.

Importers are advised that the entry of goods which are indistinguishable from those for which maximum prices are prescribed in the Meat Products and Canned Meats (Control and Maximum Prices) Order, will be approved only subject to the price and other provisions of that Order and to the provisions of the Food (Points Rationing) Order.

Canned meats for which maximum prices are not already prescribed in the Control Order will not, as a general rule, be subject to price control, but in considering applications for such goods the Ministry will have regard to the prevailing prices of controlled types. Purely luxury types of canned meats are unlikely to be approved.

Applications for Board of Trade import licences on form ILD/A, obtainable from the Import Licensing Department, Board of Trade, 189 Regent Street, London, W.1, should be made direct to the Meat and Livestock Division, Ministry of Food, Bryn Euryn, Colwyn Bay, accompanied by a sample of the product.

Importers are asked not to apply without first ensuring that export licences for the quantities offered will be issued by the authorities of the exporting countries.

BRITISH STANDARDS

Sizes of Photographic Dry Plates: Standardization of the sizes of photographic plates is more difficult than standardization of other sensitized material, through the relative difficulty of cutting glass to very precise measurements and the problems that arise when an attempt is made to define methods of measuring and to specify tolerances. The cut edges of the glass may not be straight, but may be curved, wavy or rough and again may not be square to the surface of the glass; other problems of measurement are introduced when the edges are ground. Provided that the sides of a plate are parallel, its maximum size can be determined by measuring the distance between metal straight-edges laid closely along the two pairs of parallel sides in turn, but such a method does not, of course, take into account lack of squareness. In practice, a plate is acceptable for size if it fits the plate holder of a camera of the given picture size, but because of these difficulties of measurement, definitions of sizes and tolerances must be expressed in theoretical terms.

For the purpose of B.S. 1406 : 1947, the method adopted for checking provides that they shall pass through a gauge representing a parallel-sided plate of the appropriate cutting-size, plus a reasonable tolerance; but shall not pass through a similar gauge representing this cutting size, less the tolerance allowed. This British Standard gives the definitions of the nominal sizes, cutting sizes and thicknesses of photographic plates, with the tolerances allowed, and also specifies the method of marking packaged plates.

Copies of this Standard may be obtained from the Sales Department, British Standards Institution, 24 Victoria Street, London, S.W.1, price 2s. post free.

MISCELLANEOUS

Corn Prices in England and Wales: The Ministry of Agriculture and Fisheries state that the average prices of British corn per cwt. in returns received in the week ended October 25 were: wheat, 18s. 9d., barley, 25s. 0d., and oats, 20s. 1d.

PUBLICATIONS RECEIVED

Colours for 1948. (British Colour Council, 13 Portman Square, London, W.1.)

The British Colour Council have published a series of Colour Cards for the spring and summer of 1948. Among the materials for which the colour sample cards have been designed are silk and rayon, wool, leather, cotton and knitwear.

British Iron and Steel Federation Statistical Year Book for 1946, *Tariff Supplement.* (Steele House, Tothill Street, Westminster, London, S.W.1.)

Industrial Association of Wales and Monmouthshire, (Joint Secretaries to the Association—South Wales John Pares, B.A., A.M.I.P.E., Aberdare House, Mountstuart Square, Cardiff; North Wales, G. Roger Prys, 10 Penlaw Street, Pwllheli).

American Factory Production of Women's Clothing by M. L. Disher. (Devereaux Publications Ltd., 36 Maiden Lane, London, W.C.2).

Boletin de Estadistica, April—June 1947. (Instituto de Estadistica, Madrid.)

Czechoslovak Economic Bulletin, No. 101. (Ministry of Foreign Trade, Prague.)

Journal of the Town Planning Institute, Vol. XXXIII, No. 6, September/October 1947. (18 Ashley Place, London, S.W.1.)

OVERSEAS TRADE SECTION

Southern Rhodesia Keener than Ever to Buy British

This article was written for the Board of Trade Journal *by His Majesty's Trade Commissioner at Salisbury. The Export Promotion Department, 35 Old Queen Street, London, S.W.1, will be pleased to answer any questions arising out of this article. An earlier article on Southern Rhodesia appeared in the* Board of Trade Journal *on July 20, 1946.*

SOUTHERN RHODESIA is just fifty-seven years old. In October 1889 a Royal Charter was granted to The British South Africa Company, which in effect gave it what might almost be termed government of the territory. The Charter expired in October 1922, and on October 1, 1923, Southern Rhodesia became a self-governing Colony. Southern Rhodesia covers an area of over 150,000 square miles, and the 1946 census gave its population at just over a million and three-quarters—eighty odd thousand of whom were Europeans. That it can support many more is made clear by the influx of emigrants, estimated this year to number one thousand a month.

The Colony is completely land-locked, access to the sea being through the Portuguese port of Beira, and through the ports of the Union of South Africa.

The first article briefly reviewed *inter alia* conditions from the world wide slump in the early thirties up to the outbreak of war in 1939, and dealt with the effect of the war on Southern Rhodesia's external trade. It is not necessary to go over this ground again. The real purpose of this article, therefore, is to try to give a picture of the immediate post-war position, and to attempt a look into the future.

In 1946 merchandise to the value of 20·7 million pounds sterling was imported into the Colony. The chief sources of supply were :—United Kingdom, £7·5 million ; Union of South Africa, £5·6 million; United States of America, £2·6 million and Canada, £1·0 million. Secondary industries still being in the development stage, Southern Rhodesia naturally imports an almost complete range of goods, and in a short article, it is not possible to list even the most important items. Exports (domestic) in 1946 were valued at £18·6 million, and re-exports at £3·1 million. The two-way trade was, therefore, fairly evenly balanced. Main export products were :—tobacco, £6·5 million ; gold, £4·8 million; asbestos, £1·9 million and chrome, £0·6 million. Other products of considerable importance exported were : meat, groundnuts and coke.

Of interest are the figures (£ million) showing the external trade of the Colony in 1945. Imports 12·5, exports (including re-exports) 18·0.

Future Trade Prospects

It is, of course, not possible as yet to give any clear idea of what Southern Rhodesia's trade figures will be at the end of 1947. The indications are that there will be an adverse, though perhaps not too serious, trade balance. This will, largely, be due to nature and transport difficulties. The Colony, this year, has experienced the worst drought in its history, with the result that enormous quantities of, for instance, maize have had to be purchased—particularly from the Argentine. To give some idea of the effects of the drought : the Colony's annual purchase of maize is estimated at 1,800,000 bags, while this year the local crop will produce only a few hundred thousand bags for sale and the bulk of the maize for consumption will have to be imported. The cost of the drought will, it is thought, well exceed £2,000,000.

Aggravated by the drought are the transport troubles. Southern Rhodesia for some years now has been suffering from a shortage of rolling stock and railway equipment. She is no different from many other countries in this respect. But the drought has intensified her difficulties, in as much that trucks that could be used for transport to the coast of primary export products, such as chrome—a valuable export—have to be used for carrying foodstuffs and for the movement of cattle from the parched areas.

Native labour is another matter that is causing worry. All non-skilled manual and domestic work is done by natives. For some time now the natives have been coming into the towns in increasing numbers, and most of them find work readily enough. They are taken on by commercial concerns, factories, and so forth ; and also they find employment easily in the homes as domestic servants and gardeners, native women are not, as a rule, employed, except as children's nurses. One result of this urban trek of the male native is that the primary producers and farmers are finding themselves seriously short of labour. The Government, however, are now very conscious of this problem and steps are being taken to deal with it.

A further cause for concern is the building position. Southern Rhodesia wants new schools, hospitals, factory and other business premises, and—not least—houses and flats. The Government, through the National and Building Housing Board, is doing its utmost to cope with the situation by bulk importation of essential materials, but it cannot, naturally, provide every requirement in this field. Private enterprise is also alive to the problem.

So much for what are, probably, the Colony's major difficulties. They are, in any case, transient and small when compared with those confronting less fortunate countries.

Chief Exports

Southern Rhodesia's main products of Mother Earth (surface and below) are general farm produce, citrus fruits, tobacco, gold, chrome, asbestos, and coal. In a year of normal rains the Colony can produce a large percentage of its basic food commodities. It can even export some of them in fair quantities. This year's export figures will, of course, reflect the drought.

Gold, until a few years ago was export No. 1, production reaching its peak in the early forties when output was valued at £6·4 million. There has been a marked decline in output ever since and production for the first six months of 1947 may not be more than £2,500,000.

Unmanufactured tobacco is now Southern Rhodesia's premier export—£6·5 million worth being exported in 1946. In spite of the drought this has been a good tobacco year. Prices paid for the leaf have, generally, topped previous records and the returns at the end of the year will be more than gratifying. Both the Government and the tobacco growers are fully alive to the value of the crop, and they are active in their endeavours to maintain and improve the quality of the product.

Asbestos and chrome are also exports of considerable value to the Colony's economy, but it is feared that results at the end of 1947 will, on account of the transport bottleneck, be disappointing.

Coal is one of Southern Rhodesia's most important minerals. The Wankie Colliery concession alone is about four hundred square miles in extent and it is estimated to contain 6,000,000,000 tons of coal. The pithead price is 7s. 0d. per ton, but owing to the present heavy cost of transport, industrialists and others in various parts of the country have to pay 20s. 0d. a ton for it. Export prospects are affected by lack of rail and port facilities. A route to the West Coast is the ambition of Rhodesians, but in the meantime the aim is to re-equip the railways (now State owned) so that they will be able to carry coal to Beira for shipment to the East.

Development Schemes

Now prominent in the Government's development programme are the Sabi Valley (a large area South-east of Salisbury) and the Karibi-Kafue Gorge schemes (Karibi is on the south side of the Zambezi, and Kafue is on the north side of the river in Northern Rhodesia).

The Sabi Valley Scheme envisages large-scale irrigation and resettlement developments. A survey of the Sabi Valley is to be carried out by a well-known United Kingdom firm of Consulting Engineers. Their report will cover a wide field of investigation; namely, geological, meteorological and hydrological conditions; soil suitability, crops, mineral resources, irrigation, native re-settlement, and many other aspects of the scheme. The survey will take about two years.

Both the Southern and Northern Rhodesian Governments are concerned in the Karibi-Kafue Gorges. This is a hydro-electric scheme and the areas have been or are being surveyed. The possibilities of the scheme are encouraging, and in the wake of it there may be industrial and mineral development.

Another important scheme that might be mentioned is the Hunyani Poort Dam, about twenty miles south of Salisbury. Work on this is to start early next year. When completed in 1949 it will, easily, be the biggest dam in the Colony, and it will hold approximately 30,000,000,000 gallons of water. It is estimated that the cost of all work entailed in the construction will be £540,000.

Secondary Industries

As a manufacturing country, Southern Rhodesia is developing. Worthy of mention is the manufacture of cotton yarn and cotton textiles, iron and steel, and light engineering equipment, chemicals, soaps and oils, tobacco and cigarettes, matches, furniture, cement, flour, etc., industrial gases, a wide range of foodstuffs, clothing and footwear. There will be further development in the industrial field when factory accommodation and machinery are available.

Southern Rhodesia is laying her part in the economic crisis. Import controls on a very wide range of goods from dollar countries have been re-imposed. The result will, naturally, be some contraction in the trade of the Colony, but it is hoped that the drain on the dollar pool in London will be lightened to the extent of £2,500,000 in the next year.

This set-back—if it can be called one—hardly blurs Southern Rhodesia's horizon. She is a young, virile country and wide awake to her possibilities; so are the people adjoining her borders in Northern Rhodesia and Nyasaland. Mention has been made of the flow of new immigrants. They have brought in considerable capital. The amount declared by them last year was £2,500,000 and for the first six months of 1947 the amount was £1,700,000. New capital brought in by immigrants in 1945 amounted to £467,000—the previous best in history. New companies were registered in 1946 with a nominal capital of £8,500,000. In 1945 the figure was £2,250,000—a record up to then. In a brief article it is not possible to give more than a general picture, but the writer hopes that some indication has been given of the Colony's prospects and potentialities.

Market for U.K. Exports

Lastly, and of first importance to United Kingdom exporters, Southern Rhodesia is a market for goods manufactured in Britain. There is no question whatever as to where Rhodesians, who are predominently of British stock, wish to turn for their imported goods—it is "Home."

The United Kingdom has nearly always been in the van as a source of supply to Southern Rhodesia, and to-day the people of the country are keener than ever to "Buy British." There are no restrictions on imports from the United Kingdom. Duties on many essential articles of consumer goods from the United Kingdom were suspended early this year. There are no complications in regard to transport—except, perhaps, the present congestion at the port of Beira. Indeed in general the position is "set fair" for the United Kingdom exporter. A word of warning, however. United Kingdom goods have always in the past enjoyed a reputation for high quality. In general they still do; but in the last couple of years there have been too many instances of shipments from Britain of shoddy high-priced productions. The seller's market is definitely passing. There is discrimination to-day and the public just will not buy "any old thing." Many instances, too, of poor and careless packing have been brought to the writer's attention recently. High quality merchandise arrives broken or damaged by sea water. The importers have the trouble of lodging claims; but what annoys them

(*Continued at foot of next column*)

Exports from Turkey

As a result of the decision of H.M. Government to suspend the free convertibility into dollars of sterling, the Turkish Government stopped issuing export licences for goods intended for the sterling area. Financial discussions were held in Ankara and continued for some weeks; these have now been adjourned without having achieved finality.

Meanwhile the following notice has been issued by the Turkish Ministry of Commerce:

"The following decisions have been taken in respect of sterling sales transactions prior to the date on which exports to the sterling area were suspended:

Licences will be granted to:—(a) those who contracted sales up to September 16, 1947, for goods not under licence, (b) those who contracted sterling sales up to September 9, 1947, for which application for an export licence was made to the Ministry of Commerce up to the evening of October 10, 1947, with the exception of applications concerning cereals, leguminous seeds and oleaginous seeds, (c) those requiring renewals in respect of licences which were issued by export unions but not utilized up to September 24, 1947.

The shipment of figs which were prepared for export and sold against sterling will be permitted.

The Ministry of Commerce will grant export licences for sales of tobacco against sterling to the United Kingdom, India and Egypt."

This announcement is a summary of a Circular (No. 194) which has been issued on the subject, and it is emphasized that it is given "for information only," and that for details "competent authorities" should refer to the Circular.

Nationalization in Poland

The following Polish Gazettes containing lists of concerns affected by the Order in Council of Ministers of January 30, 1947, regarding the procedure for the taking over of undertakings into the ownership of the State are available for inspection at the Trading with the Enemy Department, 7 Crosby Square, London, E.C.3 (Telephone No. Avenue 5282, Extension 228).

Kielce No. 11.
Rzeszow No. 7 (15) and No. 6.
Pomorze No. 16 and 18.
Lodz No. 19.
Monitor Polski No. 115, 116, 122.
Silesian-Dubrowa No. 29.
Wroclaw No. 8.
Stettin No. 9 and No. 11.

Indian Crop Conditions

The Department of Commercial Intelligence and Statistics, Calcutta, reports as follows on the crops and weather in India for the weeks ending on the dates given:

Madras, October 11.—Rainfall has been moderate to fair. Standing crops are in fair condition.

Bihar, October 13.—Rainfall has been heavy to moderate. Standing crops are fair. The harvesting of bhadai crops is continuing.

Orissa, October 13.—Rainfall has been heavy in Puri and light to moderate in other places. Harvesting of autumn paddy and jute is progressing.

Bombay, October 17.—There has been practically no rain. Harvesting of kharif crops is in full swing.

West Bengal, October 8.—There has been rain in all the province. Weeding of Aman paddy and harvesting of Aus paddy are almost completed. Standing crops are fair.

Southern Rhodesian Trade

(*Continued from previous column*)

most is that they have to wait, maybe months, for replacements.

Another complaint from firms in Southern Rhodesia is that letters sent to the United Kingdom are often not answered, or even acknowledged.

These, it is suggested, are matters that should receive the serious attention of United Kingdom firms trading with Southern Rhodesia—which has for the Old Country nothing but the best of goodwill.

Post-War Markets for U.K. Exports in Georgia, U.S.

This article was written for the Board of Trade Journal *by His Majesty's Consul at Atlanta. The Export Promotion Department, 35 Old Queen Street, London, S.W.1, will be pleased to answer any questions arising out of this article.*

WITH a population of approximately 3,500,000 and an area of 58,876 square miles, Georgia is the largest State east of the Mississippi River. The Atlanta consular district also covers the States of South Carolina (with a population of nearly 2 million) and part of Tennessee.

Although Georgia is primarily an agricultural State, like its two neighbours, its industrial wealth is expanding rapidly, and the value of its manufactured products now exceeds that of agricultural crops. Industrial investment in Georgia is intensive ; during 1946 some 600 new industries were started in the State, and this rate is being more than maintained in 1947. Textile manufacturing is still Georgia's leading industry, but the production of naval stores, manufacture of clay products, and the pottery industry are also essential factors in Georgia's increasing industrial wealth. Among the many new industries which have started up are the manufacture of cement products, chemicals, wood products, metal work, etc.

Atlanta, the capital of Georgia, is the core of this industrial growth, and with a population of approximately 550,000 (an increase of 107,700 since 1940) the city is easily the largest and most flourishing in the area under review. More than 3,000 American business concerns have branch offices in Atlanta, which acts as the principal distribution centre for the South-east. It is a leading railway and air centre, with direct transportation to all parts of the United States.

Market for Consumer Goods

Atlanta's industrial growth has led to a considerable expansion of markets for consumer goods, and retail sales have accordingly increased considerably. Atlanta offers the best market in this area for certain types of British goods, chiefly woollens, footwear, sportswear, raincoats, gloves, china and silverware, antiques, motorcycles, bicycles and whisky.

Modest quantities of certain of these goods are at present being sold in Atlanta, and on a much smaller scale elsewhere in Georgia, South Carolina and Tennessee, by the large department stores, who receive them from the New York agents of the United Kingdom firms concerned or through their London buying offices. To a lesser extent these goods are also handled locally by small individual firms who obtain them from New York agents. Although sales of such goods are at present limited, a potential demand for increased quantities exists, particularly for high-grade articles.

Possibilities of Regional Marketing

There is little if any direct importation of goods from the United Kingdom in this area, but the possibility of direct shipment of goods to Georgia's chief port of Savannah, and to the port of Charleston in South Carolina, should be considered by British exporters. Before the war British goods, chiefly leather and linoleum, were imported into Savannah. The Savannah Import & Export Company has now been re-established for the purpose of dealing in import-export trade. Both ports are being expanded and improved, particularly Charleston. Regional marketing of British goods in this area would serve to meet the demand which cannot be met by existing coverage from New York. Personal on-the-spot investigation by British manufacturers or their representatives is recommended. The possibility of introducing new lines on the local market should also be considered, and samples of new types of British goods should where possible be tried out. Attractive advertising and publicity are, of course, essential to promote the sale of any type of British article.

Interest in the possibilities of international trade is growing in this area, and a World Trade Council has recently been established in Atlanta by a group of prominent businessmen with the co-operation of the Atlanta Chamber of Commerce, the Federal Reserve Bank and the United States Regional Department of Commerce. It is hoped that the Council will in time make Atlanta and Georgia a trading post to meet the needs not only of Georgia but of the entire South-east.

Canada's Export Trade, January–July

DURING the first seven months of 1947 Canadian domestic exports to the United States were valued at $564,113,000, which is $92,912,000 higher than for the corresponding period of 1946 states *Foreign Trade*, published by the Department of Trade and Commerce, Ottawa. Shipments to the United Kingdom valued at $422,083,000, were also higher than in the same period last year by $115,596,000. The increase in Canadian exports to all countries in the British Commonwealth and Empire amounts to $238,975,000 for the period under review.

Particular interest is roused by the continued improvement in trade relations with South Africa as the Dominion's Minister of Trade and Commerce is heading a mission to that country in an effort to stimulate interest in Canadian products and to explain the desire of Canada to purchase additional commodities from the Union. Exports in the first seven months of 1947 had a value of $45,153,000, which is $12,552,000 higher than for the corresponding period of 1946, and $35,279,000 greater than in the same period of 1938.

Other countries in the British Commonwealth and Empire to which Canada has shipped a larger value of merchandise during the present year than in 1946 are : Eire, Newfoundland, Jamaica, Trinidad and Tobago, the Bahamas, the Leeward and Windward Islands, British Guiana, Southern Rhodesia, the Malayan Union and Singapore, Palestine, Australia and New Zealand. On the other hand there has been a material decrease in exports to India.

Foreign Destinations

Foreign countries to which Canada has shipped this year a materially larger value of goods are : Argentina, Brazil, Cuba, Ecuador, Denmark, Italy, the Netherlands, Norway, Sweden, Switzerland, China and Syria. On the other hand, there has been a marked decline in exports to Belgium, Greece, the Soviet Union, Yugoslavia and French Africa.

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Restriction of Imports into Egypt

A NOTICE appeared in our issue of October 18 stating that the Egyptian authorities had decided to restrict imports into Egypt to essential goods until December 31, 1947. It was stated in the notice that the list of goods classified as essential by the Egyptian authorities would be published as soon as possible. The Board have, however, now been advised by His Majesty's Minister (Commercial) at Cairo that no official list of essential goods is as yet available. He suggests, however, that exporters might take as a rough working guide the list which was published in the Egyptian paper *Journal du Commerce et de la.* This list is as follows :—

Goods classified as Essential for the purpose of Importation into Egypt

Tea.
Coffee.
Tobacco.
Newsprint.
Wrapping paper.
Phosphorized wrapping paper.
Cigarette paper.
Carbon paper and Stencils.
Other kinds of paper.
Toilet paper.
Ordinary cardboard.
Cellophane paper.
Tin, raw, and in ingots.
Caustic soda
Tinplate in sheets
Glass and glassware
Crystal
Medicines and drugs
Serum
Wood (various)
Cork and articles of cork
Motor tyres (outer covers)
Inner tubes for above
Motor cycle tyres (outer covers)
Inner tubes for above.
Bicycle tyres (outer covers).
Inner tubes for above.
Rubber fabrics for sanitary articles.
Rubber belting.
Motor cars.
Motor buses.
Spare parts for the above
Chassis.
Pumps, steam engines and apparatus, lifting apparatus, etc.
Machines and looms for knitting.
Looms for weaving.
Sewing machines.
Spare parts for the above.
Machines for the manufacture of paper and cardboard.
Type setting machines.
Butter churns and accessories.
Agricultural machines and apparatus and incubators.
Milling machinery.
Machines for the manufacture of oils.
Machines for the manufacture of alimentary pastes.
Other machines, not specified.
Hand pumps.
Discs for ginning machinery.
Other spare parts for machinery.
Kitchen stoves, kerosene or spirit.
Spare parts for above.
Electric generators and motors.
Electric batteries and parts (excluding pocket batteries).
Electric accumulators and parts.
Electric lamps.
Telegraph and wireless telegraphy apparatus.
Electric signalling apparatus.
Electro-medical apparatus.
Electric cables.
Insulated electric wires.
Carbons for electric use.
Other electric apparatus and parts.
Bicycles.
Spare parts for bicycles.
Motor cycles and side-cars.
Spare parts for above.
Iron and steel bars.
Iron and steel rails.
Iron and steel wires.
Iron and steel sheet (common).
Other articles in iron and steel.
Cast iron pipes.
Baths and flush boxes.
Iron and steel pipes and tubes.
Pipes and tubes, tinned or brass coated.
Sheet iron receptacles.
Hoes and other agricultural implements.
Saws.
Iron and steel files (plain or tinned).
Parts for agricultural machinery.
Implements (various).
Nails (various).
Nuts and bolts.
Cable and wire ropes (iron).
Wire netting (iron or steel).
Chains.
Locks and padlocks.
Hinges for doors and windows.
Sewing needles and pins.
Springs for machinery.
Copper (raw, rough cast, scrap and waste).
Copper and brass sheets.
Copper and brass bottoms.
Copper wire.
Copper tubes and pipes (common).
Locks (copper).
Bolts (copper).
Padlocks and keys (copper).
Articles of nickel (various).
Aluminium cans, sheet and foil.
Articles of lead (various).
Zinc cans and sheets.
Ships.
Apparatus and instruments for medical laboratories.
Accounting machines.
Vine stocks and nursery fruit trees.
Seed potatoes.
Agricultural seeds.
Plants and seeds for the preparation of perfumes and medicaments.
Cocoa, in beans and ground.
Fertilizers.
Raw materials for dyeing and tanning, and raw materials for industry.
Printing ink.
Varnishes and lacquers.
Prepared paints (oils).
Glue from bones and hides.
Machinery belting and leathers for cotton ginning machines.
Cinematograph film (raw stock).
Mineral oils and petroleum products.
Coal.
Real silk yarns and threads.
Artificial silk yarns and threads.
Raw wool.
Wool yarns and threads.
Cotton yarns.
Cotton threads on bobbins.
Woollen piece-goods.
Gas and water meters and parts.
Microscopes.
Photographic and cinematographic apparatus.
Spectacles.
Cod liver oil.
Linseed oil.
Castor oil.
Coconut oil for the manufacture of soap.
Olive oil for the manufacture of soap.
Palm oil for the manufacture of soap.
Vegetable oils for preparing paints.
Chemical products (excluding medicines and caustic soda).
Jute sacks.
Sheep and ewes.
Preserved milk for babies.
Corn and wheat.
Maize.

Exporters are advised that they should only ship goods to Egypt where they are satisfied that their customer holds a valid import licence. Normally import licences will only be issued for the goods listed above, but in certain cases import licences may be issed for goods not on the list if the importer undertakes that no application will be made to the Egyptian Exchange Control for sterling or other foreign exchange to pay for them. Exporters are advised to consult the Export Promotion Department of the Board of Trade or H.M. Minister (Commercial) at British Embassy, Cairo, in any cases of doubt about whether import licences held by their customers carries the necessary foreign exchange allocation.

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E.H.

Market for United Kingdom Goods in the Mid-U.S.

This article was written for the Board of Trade Journal *by His Majesty's Consul at Kansas City. The Export Promotion Department, 35 Old Queen Street, London, S.W.1, will be pleased to answer any questions arising out of this article.*

GREATER Kansas City, which includes the two cities of that name in Kansas and Missouri, has a population of about 700,000 people. It is served by four major airlines with 142 flights daily; by 12 railroads—more than 300 trains arrive and leave daily—and by motor bus lines operating 400 buses per day to all parts of the country. More than 41 million travellers arrived or departed from Kansas City in 1945 and more than 40,000,000 tons of freight and 5,000,000 express packages are handled by the railroads alone annually.

Kansas City would be important, therefore, in its own right, but it has to British exporters an importance which is much greater—Kansas City is strategically situated in the centre of the Mid-Continent of America (see map).

To speak of the Mid-West is to court confusion. No two authors give the same geographical limits to the term. For instance, one "Hoosier" (as natives of the State are called) from Indiana might call himself a Mid-Westerner, whereas another might not. H.M. Consul in New Orleans rightly uses the term Mid-Continent, which he explains geographically as being an area bounded in the east by the Appalachians, on the north by the Canadian border and on the west by the Rockies. The core of that Mid-Continent area is served by Kansas City itself, lying at the heart of the area.

The particular area of this Mid-Continent for which Kansas City is the ideal distribution centre are the States of Minnesota, Iowa, North Dakota, South Dakota, Nebraska, Missouri and Kansas. According to the 1943 census these States have a population of 13,000,000 people who pay income tax, with actually an average income of $2,033 per annum, living in an area of 517,000 square miles. To this could be added the State of Oklahoma with a further 64,700 people, with an average income of $2,229 per annum.

Thanks to the diversified nature of its natural resources—minerals, agriculture, livestock and petroleum—the local purchasing power is high, being (*vide* returns of 1941) approximately 4·75 billion dollars declared by approximately 2,130,000 individuals. Racially British, Dutch, German and Scandinavian stock predominate.

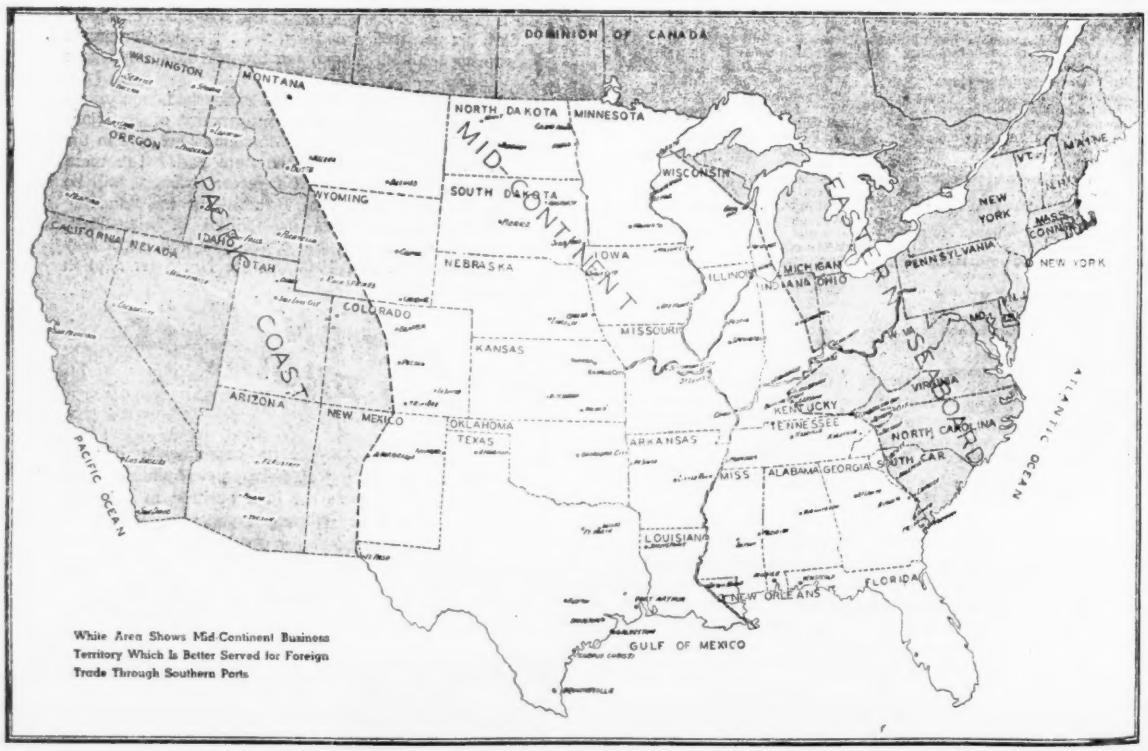
Trade Possibilities

British goods are well liked because of their high quality, but prices—it is said—are higher than they need be, and this may well be explained by the unfamiliarity of British businessmen with this territory. For too many New York suffices; the more adventurous ones may proceed to Chicago; yet Kansas City is quickly and easily reached.

There is a market for most of those conventional goods which are saleable in countries with a high standard of living—chinaware, woollen blankets, cutlery, sportswear, saddlery, boots and shoes, fishing utensils, sporting goods, whisky and even ale, to mention but a few.

The Gulf ports of Houston, Galveston, New Orleans and Mobile all offer freight advantages: sea rates being approximately the same from Great Britain either to the East Atlantic Coast or to the Gulf, freight rates from port to Kansas City show vital differences—as much as 40 c. (rates in cents per 100 pounds) more if routed via New York or Baltimore.* The difference may well mean that between profit and loss. It is plain, therefore, that routing via the

(*Continued on next page*)



White Area Shows Mid-Continent Business Territory Which Is Better Served for Foreign Trade Through Southern Ports

Market for U.K. Goods—*(Continued)*

Gulf would put the British exporter in a better competitive position.

Kansas City's importance, not only as a centre of trade and commerce but industrially, increased greatly during the War and it has been permanently affected by its quick rise as an important centre of war production. It had always had a justified pride in its position as an agricultural, grain and livestock capital—for instance, in 1943 it became for the first time the world's largest cattle market, with receipts of 2,404,974 head—but to-day it has gained national recognition in another equally important field—industry.

Future Prospects

In 1946 no less than 52 new major industrial concerns came to the city and over 190 expansions of already existing plants were made. The value of the annual volume of manufactured products has been increased by $120,000,000. Wearing apparel manufacture has developed into a business of over 80 million dollars a year.

Because of its central position Kansas City has become a meeting place for national conferences and in the Municipal Auditorium some 24,000 persons can be addressed by means of the public address system.

The larger banks in the area have well-established Foreign Departments with London correspondents, capable of handling any banking transactions that may occur. There is a forceful and active Foreign Trade section of the Chamber of Commerce.

In Commerce as in military science there are two approaches to success, the short-term view which is tactics, and the long-term view which is strategy. There can be no success without a happy combination of both. It may well be, certainly it demands at least most careful study, that representation in New York and/or even Chicago is only the short-term view of approaching the growing possibilities of this great Mid-Continent. Closer examination may lead to the conclusion that the long-term view will necessitate representation or at any rate part-time representation in the city, Kansas City, Missouri, which is at the very hub of the great Mid-Continent area and one which should become the key distributing centre for British imports.

* New Orleans Traffic and Transportation Bureau Booklet No. 1, March 1946.

Regional Salvage and Recovery Officers

READERS may like to keep the following list of Board of Trade Regional Salvage and Recovery Officers for reference :—

NORTHERN.—Mr. A. J. S. Rider, Clarendon House, Clayton Street West, Newcastle-on-Tyne, 1. (Tel. : Newcastle 27550.)

E. & W. RIDING.—Mr. H. E. Henson, Pearl Chambers, East Parade, Leeds, 1. (Tel. : Leeds 31761.)

NORTH MIDLAND.—Mr. A. J. Enoch, Government Buildings, Clifton Boulevard, Nottingham. (Tel. : Nottingham 73013.)

EASTERN.—Mr. C. A. Atkins, Shaftesbury Road, Brooklands Avenue, Cambridge. (Tel. : Cambridge 56221.)

LONDON & S.E.—Mr. M. Hart, 3 Central Buildings, Matthew Parker Street, London, S.W.1. (Tel. : Abbey 5678.)

SOUTHERN.—Mr. F. H. Thomas, Marlborough House, Parkside Road, Reading, Berks. (Tel. : Reading 60431.)

SOUTH WESTERN : Mr. F. J. Coates, 37 Julian Road, Sneyd Park, Bristol, 9. (Tel. : Bristol 38446.)

WALES.—Mr. L. F. Sincock, Imperial Buildings, Docks, Cardiff. (Tel. : Cardiff 5920.)

MIDLAND.—Mr. W. P. Johnston, C.M.L. Buildings, Gt. Charles Street, Birmingham, 3. (Tel. : Birmingham Central 8231.)

NORTH WESTERN.—Mr. A. J. B. Orr, Danlee Buildings, 53 Spring Gardens, Manchester, 2. (Tel. : Manchester Central 6544.)

SCOTLAND.—Mr. W. McCorkindale, 84 Wilson Street, Glasgow, C.2. (Tel. : Glasgow Bell 1311.)

NORTHERN IRELAND.—Mr. W. E. C. O'Brien, Ministry of Commerce, 55 Linenhall Street, Belfast. (Tel. : Belfast 28271.)

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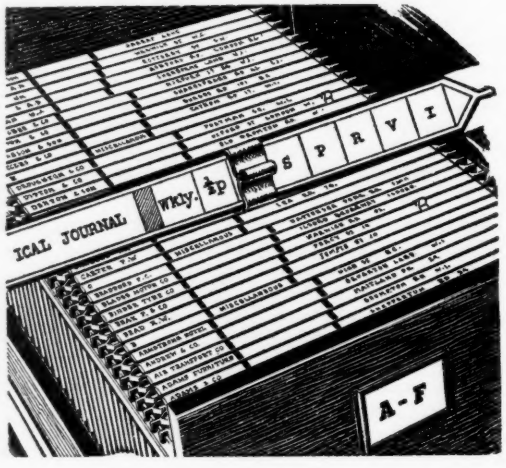

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Customs Regulations and Tariff Changes

Australian Tariff Board Reference

HIS MAJESTY'S Trade Commissioner at Sydney has reported that the Commonwealth Minister for Trade and Customs has referred the following questions to the Tariff Board :—

(*a*) Whether there is any necessity to import from dollar currency countries the following goods—
(i) spectacle frames and mountings of any kind ;
(ii) optical lenses and blanks of any kind.

(*b*) Whether the local production of spectacle frames and mountings, and optical lenses and blanks, and the quantity of such goods available from sterling and easy currency countries, are adequate to meet Australian needs.

(*c*) Whether spectacle frames and mountings, and optical lenses and blanks, manufactured in Australia are of reasonable quality, and would the restriction of imports of such goods from dollar currency countries impose any real hardship on Australian users.

(*d*) Whether any Australian manufacturer of spectacle frames and mountings, and optical lenses and blanks gives a purchasing advantage to any Australian wholesaler over other Australian wholesalers, and if so, is the advantage reasonable or otherwise.

Any United Kingdom Trade Association or firm which may desire to present evidence at the enquiry should communicate at once with the Board of Trade, Export Promotion Department, 35 Old Queen Street, London, S.W.1, quoting reference number 41852/1947.

Primage Duties : The Board of Trade have received from H.M. Trade Commissioner at Sydney copies of Customs Proclamations Nos. 688 and 689, published in the *Commonwealth Gazette* of October 2, 1947. They provide, respectively, for the exemption from primage duty of goods covered by Tariff Item 379, when they are admissible under the British Preferential Tariff, and for the reduction in the rate of primage duty to 5 per cent. when they are not so admissible.

Tariff Item 379 reads as follows :—

" Blankets, rubber or wool for printing machines, top cloths for ruling machines, when imported with the machines of which they form a necessary working part, one or more as required for working the machine ; felts and wires for paper making machines ; felts for asbestos cement sheet making machines."

Southern Rhodesia

Suspension of Duties on Building Materials: Government Notice No. 800, published in the Southern Rhodesia *Government Gazette* of October 10, 1947, notifies that the duties on the following tariff items are wholly suspended :

SCHEDULE

Paragraph	Goods
331	Chemical closets.
102	Lavatory basins, steel, porcelain, enamelled.
102	Lavatory basins, perspex.
331	Nissen huts and similar structures, unassembled.
331	Plastic seats for sanitary pans imported separately.
275	Shingles.

Canadian Customs Tariff

His Majesty's Senior Trade Commissioner at Ottawa has forwarded a copy of Memorandum Series D, No. 47, T.C. 178, Supplement No. 3, dated October 3, 1947, issued by the Department of National Revenue, which states that by Order in Council P.C. 3976, the following item is re-established, effective October 1, 1947.

231e Phenol when imported by manufacturers of synthetic resin glues, for use only in the manufacture of such glues in their own factories.

British Preferential Tariff	Free
Intermediate Tariff	Free
General Tariff	Free

Chinese Customs Tariff Modifications

THE Board of Trade have received a copy of Customs Notification No. 160 which contains the following modifications to the Chinese Import Tariff :—

Tariff No.	Classification	Import duty	
		Former	New
		Ad val.	*Ad val.*
Ex. 520	Gasolene	Free	50 per cent.
Ex. 529	Liquid fuel (fuel oil) (except crude oil)	Free	50 per cent.
Ex. 529	Crude oil	Free	No change
Ex. 532	Kerosene oil	30 per cent.	50 per cent.
	Revised heading :—		
529	Liquid fuel (fuel oil) :—		
	(*a*) With specific gravity over 0·83 at 20° C., flashpoint over 85° C. (Cleveland Open Cup), and containing not over 80 per cent. of kerosene.		
	(*b*) (1) Others (fuel oils containing over 80 per cent. but not over 99 per cent. of kerosene) ;		
	(2) Crude oil (with specific gravity over 0·83 at 20° C., more than 3 per cent. light fraction on distillation up to 150° C., and viscosity over 2° Engler at 20° C.).		

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Fiji

Customs Tariff Modifications: The Board of Trade have received a copy of a Notification in the Supplement to the Fiji *Royal Gazette* of August 1, 1947, which provides for the following modifications to the Fiji Customs Tariff, with effect from July 18, 1947 :—

Item No.	Article	British Preferential Tariff	General Tariff
	The following items are additions :—		
20A	Articles imported by persons engaged in scientific research when certified to be for use in connection with such work and provided that the research activities have been approved by the Governor in Council	Free	Free
178A	Wire, fencing, barbed, black, not less than No. 14 British gauge ... *ad valorem*	Free	20 per cent.
	The following items are amended to read as follows :—		
128	Pictures, paintings, drawings, maps, atlases, plans, sketches, etchings and photographs, including enlargements and reproductions, unframed *and framed ... ad valorem*	Free	20 per cent.
98f	Sugar-making machinery; paper-making machinery; can-making machinery; fruit and meat canning machinery; rice-milling machinery; timber-milling, sawing and planing machinery [other than portable with the exception of circular saws of less than 15 inches in diameter]; pit saws not less than 6 ft. in length; wood copying lathes; water turbines of not less than 5 h.p.; pipes, piping, tubes and fittings of wood, concrete or composition screwed or unscrewed, not flexible of an internal diameter not less than one inch, except down-piping and guttering; grain-milling machinery other than for domestic use; and such other as the Governor in Council may from time to time specify and necessary permanent mill fixtures for the installation of the above and component and fashioned parts thereof including bolts and nuts imported with and belonging to same ... ... *ad valorem*	7½ per cent.	22½ per cent.

This Notice further provides that in respect of any portable units of sawing and planing machinery imported on or after January 1, 1947, the Legislative Council approves the refund of the difference between the Customs Duties actually collected and what would have been collected if the following rates had applied :—

British Preferential Tariff ... ... 7½ per cent.
General Tariff ... ... 22½ per cent.

Note.—The wording in italics represents an addition to the Tariff.
The wording in square brackets [ ] represents a deletion from the Tariff.

Cuba

Import Quotas : In regard to the Notice under the above heading in the *Board of Trade Journal* for October 25 (page 1862), information has now reached the Board of Trade from Havana that no steps will be taken to enforce import quotas at least until after the conclusion of the Conference on International Trade which opens at Havana next month.

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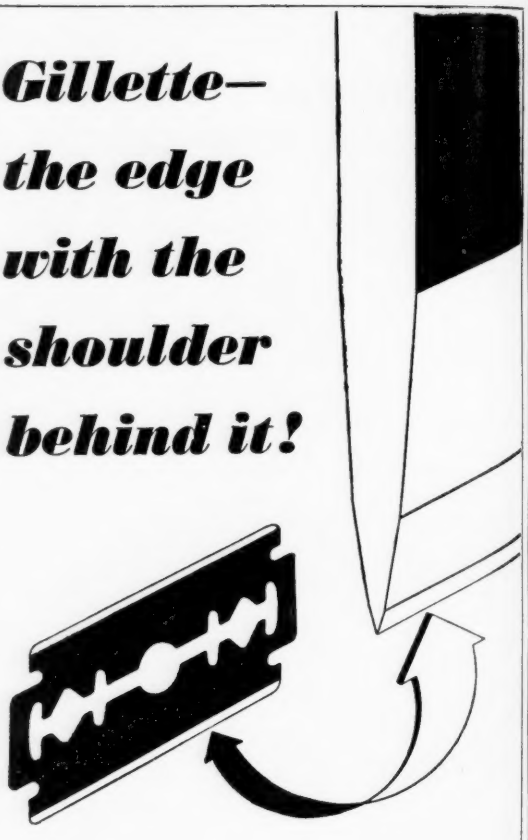

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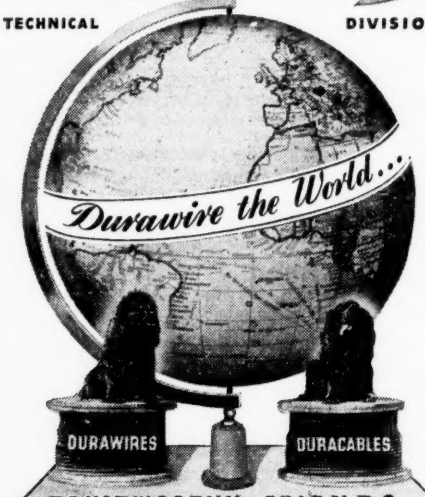

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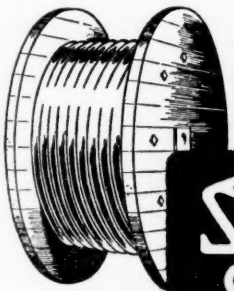

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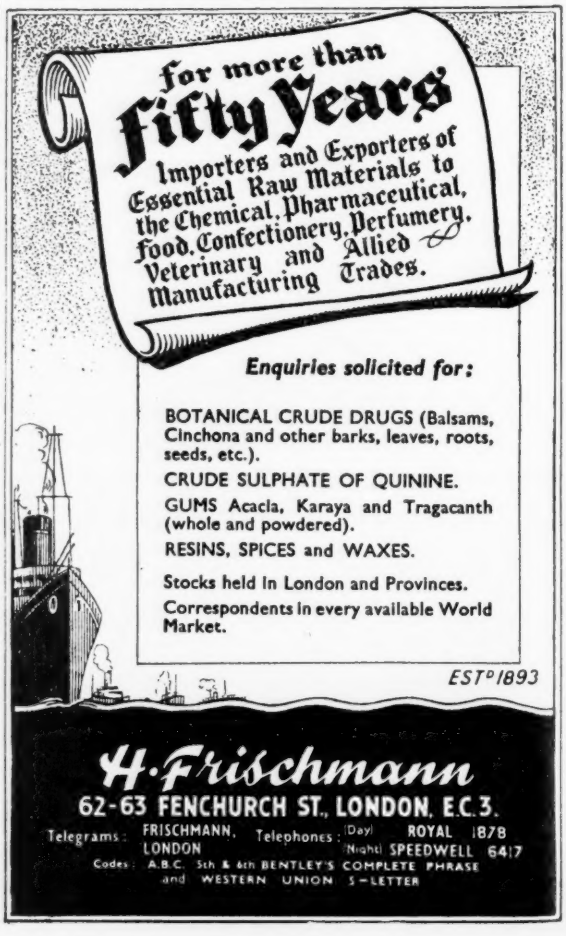
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Exhibitions and Fairs

Spotlight on Footwear

QUALITY has always been the major factor in sales of British footwear abroad. To-day this mark of quality is still dominant. Overseas buyers are invited to see for themselves that Britain still leads in this field at an exhibition to be held at the Seymour Hall, London, W.1, from November 10 to 14 inclusive.

A feature of the exhibition will be a Footlight Parade. A stage will be designed to give the atmosphere of a fashionable shoe shop interior. Here mannequins will "model" shoes for all occasions, so as to give the audience an all-round view of what the models will look like on the foot. A running commentary will explain their special features. The parade will be repeated three or four times daily, some 50 pairs of shoes being displayed.

Although the theme of the exhibition will be quality of materials and workmanship, design will also play an important part. In the past few years British manufacturers have attached increasing importance to the design of both formal and informal footwear. The sponsors of the Quality Footwear Exhibition, The National Trade Press Ltd., will have a stand devoted to design on which will be exhibited a number of shoes made up by manufacturers from the prize-winning designs submitted to "Footwear" 1947 Shoe Design Competition.

The following list of trade exhibitions and fairs in the United Kingdom and overseas is compiled from information furnished by the organizers and by the overseas officers of the Export Promotion Department. It will be understood that no responsibility is taken for the standing of the organizations or individuals mentioned and that dates, etc., may be subject to alteration. This list is not exhaustive and further information about these and other events may be obtained from the Exhibitions Branch of the Export Promotion Department, 35 Old Queen Street, S.W.1. (Victoria 9040). Recent additions to the list are indicated by an asterisk*

Organizers of exhibitions in the United Kingdom are invited to send copies of the catalogue to the Department for the information of overseas visitors calling at its offices.

The Department is also interested to learn of the decision of United Kingdom firms to participate in exhibitions and fairs overseas, and of their experience of the value of the various events.

United Kingdom

1947

QUALITY FOOTWEAR EXHIBITION—
November 10–14, 1947. At Seymour Hall, Seymour Place, London, W.1. Apply to Mr. Hal. W. Hurst, National Trade Press Ltd., Drury House, Russell Street, London, W.C.2. (Tel.: Temple Bar 3422.)

BUILDING EXHIBITION, LONDON—
November 19–December 4, 1947. At Olympia (Grand and National Halls). Apply to Building Trades Exhibition, Ltd., 4 Vernon Place, Southampton Row, W.C.1. (Tel.: Holborn 8146-7.)

1948

HOTEL, RESTAURANT AND CATERING EXHIBITION—
January 16–24, 1948, at Olympia. Apply to Trade and Technical Exhibitions, Ltd., 1 Dorset Buildings, Salisbury Square, London, E.C.4. (Tel.: Whitehall 0568.)

GAUGE AND TOOL MAKERS' EXHIBITION—
January 26–February 6, 1948. At the Royal Horticultural Halls, Vincent Square, London, S.W.1. Apply to the Gauge and Tool Makers' Association, Standbrook House, Old Bond Street, London, W.1. (Tel.: Regent 3451-2.)

HEALTH AND HOLIDAYS EXHIBITION, (INTERNATIONAL)—
* February 23–March 27, 1948. At Earls Court. Apply to Health and Holidays Ltd., Stagg & Russell Building, 2–4 New Coventry Street, London, W.1. (Tel.: Gerrard 7021).

DAILY MAIL IDEAL HOME EXHIBITION—
* March 2–25, 1948. At Olympia. Apply to Associated Newspapers, Ltd., Carmelite House, London, E.C.4. (Tel.: Central 6000.)

BRITISH INDUSTRIES FAIR, LONDON AND BIRMINGHAM—
May 3–14. Apply to Export Promotion Dept., 35 Old Queen Street, London, S.W.1, or to Birmingham Chamber of Commerce, 95 New Street, Birmingham.

8TH ANTIQUE DEALERS' FAIR AND EXHIBITION—
* June 10–25, 1948. At Great Hall, Grosvenor House, Park Lane, W.1. Apply to Captain C. S. Platts, Room 904, Grosvenor House, Park Lane, W.1. (Tel.: Grosvenor 6363, Extension 904.)

1ST NATIONAL MECHANICAL HANDLING EXHIBITION AND CONVENTION—
July 12–21, 1948. At National Hall, Olympia. Apply to "Mechanical Handling," Dorset House, Stamford Street, London, S.E.1. (Tel.: Waterloo 3333.)

MACHINE TOOL AND ENGINEERING EXHIBITION(INTERNATIONAL)—
August 26–September 11, 1948. At Olympia. Apply to the Machine Tool Trades Association, Victoria House, Southampton Row, London, W.C.1. (Tel.: Holborn 4667/8.)

Overseas

1947

PARIS, INTERNATIONAL MOTOR SHOW—
October 23–November 5, 1947. Apply to Grand Palais, Porte J. Paris. (Postponed from October 2–12.)

PARIS, PACKAGING, CONDITIONING AND HANDLING EXHIBITION—
October 23–November 5, 1947. Apply to 40 Rue du Colisee, Paris. (Postponed from October 2–12.)

PARIS, INTERNATIONAL BOTTLING EQUIPMENT EXHIBITION—
October 23–November 5, 1947. Apply to 53 Av. Montaigne, Paris. (Postponed from October 2–12.)

BOMBAY, FREE INDIA AGRICULTURAL AND INDUSTRIAL EXHIBITION—
* December 1–27, 1947. At Azad Maidan, Bombay. Apply to Hon. Secretary, 26 Ridge Road, Malabar Hill, Bombay.

1948

CLEVELAND, NATIONAL MATERIALS HANDLING EXPOSITION—
* January 12–16, 1948. At Public Auditorium. Apply to Messrs. Clapp & Poliak, Empire State Building, New York City, 1.

PANAMA, SECOND EXPOSITION OF NATIONAL AND FOREIGN INDUSTRIES—
* January 31–February 7, 1948. Apply to the Secretary, Lions Club of Panama, Avenida Norte 61, Panama City.

CHICAGO, NATIONAL BOAT SHOW—
January 31–February 8, 1948. At the Navy Pier, Chicago. Apply to General Manager, Mr. Hubbard H. Erickson at above address.

CALCUTTA, ALL-INDIA EXHIBITION—
* February 1–28, 1948. Apply to General Secretary, 6 Old Post Office Street, G.P.O., Calcutta, 1.

NEW YORK, INTERNATIONAL AIR CONDITIONING EXPOSITION—
February 2–6, 1948. At Grand Central Palace. Apply to Messrs. Chas. F. Roth & E. K. Stevens, International Exposition Co., Inc., at above address.

CAIRO, EGYPTIAN AGRICULTURAL AND INDUSTRIAL EXHIBITION—
February 15–March 15, 1948. At Gezira, Cairo. Apply to Royal Agricultural Society, Cairo. Final date for space applications past.

PARIS, AGRICULTURAL MACHINERY EXHIBITION—
March 2–7, 1948. At the Parc des Expositions. Apply to the Committee of the "Salon de la Machine Agricole," 38 rue de Chateaudun, Paris. Final date for space applications, October 31, 1947.

BASLE, INTERNATIONAL FUR AND LEATHER FAIR—
March 8–15, 1948. Apply to Manager, 24 Isteinerstrasse, Basle, Switzerland, or to United Kingdom representative, Mr. R. Winckelmann, 55 Hartington Road, London, W.4. (Tel.: Chiswick 2365.) Final date for space applications December 15, 1947.

GENEVA, INTERNATIONAL MOTOR EXHIBITION—
March 11–21, 1948. Apply to the Secretariat General, 1 Place du Lac 1, Geneva, Switzerland.

(*Continued on next page*)

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Exhibitions and Fairs

(*Continued from previous page*)

TORONTO, CANADIAN NATIONAL SPORTSMEN'S SHOW—
March 13–20, 1948. At the Coliseum. Apply to the
* Toronto Anglers' and Hunters' Association, Inc., 53 Yonge Street, Toronto.

VIENNA, SPRING FAIR—
March 14–21, 1948. Apply to the British-Austrian Chamber of Commerce, 29 Dorset Square, London, N.W.1. (Tel.: Paddington 7646.) Final date for space applications January 14, 1948.

PRAGUE, INTERNATIONAL FAIR—
March 15–22, 1948. Apply to Secretary, The Czechoslovak Economic Association, 64 Great Cumberland Place, London, W.1. (Tel.: Ambassador 1801.)

CHICAGO, PRODUCTION SHOW AND CONFERENCE—
March 17–19, 1948. At Stevens Hotel. Apply to the Chicago Technical Societies Council, 53 W. Jackson Boulevard, Chicago, 4.

JOHANNESBURG, WITWATERSRAND AGRICULTURAL SHOW—
March 19–29, 1948. At Milner Park. Apply to the Secretary, Witwatersrand Agricultural Society, Johannesburg, South Africa.

COPENHAGEN, DANISH INDUSTRIAL EXHIBITION—
* April 2–12, 1948. Apply to the Secretary, Borgergade 18, Copenhagen.

LYONS, INTERNATIONAL FAIR—
April 3–12, 1948. Apply to Clifford Martin, Ltd., 33 Regent Street, London, S.W.1. (Tel.: Regent 3051.) Final date for space applications December 31, 1947.

UTRECHT, ROYAL NETHERLANDS INDUSTRIES FAIR (INTERNATIONAL)—
April 6–15, 1948. Apply to the Netherlands Economic Service, Royal Netherlands Embassy, or Mr. W. Friedhoff, Netherlands Chamber of Commerce, Hereford House, 117 Park Street, London, W.1. (Tel.: Mayfair 4641.)

BASLE, SWISS INDUSTRIES FAIR—
April 10–20, 1948. Apply to the Swiss Legation, Division Economique, 18 Montagu Place, London, W.1. (Tel.: Paddington 0701.)

MILAN, INTERNATIONAL SAMPLES FAIR—
April 12–27, 1948. Apply to Secretary-General, Fiera di Milano, Via Domodossola, Milan.

HELSINKI, FINNISH INDUSTRIES FAIR—
April 14–23, 1948. At Masshall. Apply to Finland's Massa, Helsinki Final date for space applications, December 31, 1947.

BRUSSELS INTERNATIONAL FAIR—
April 17–28, 1948. Apply to Palais du Centenaire, Brussels.

POZNAN, INTERNATIONAL FAIR—
April 24–May 9, 1948. Apply to Commercial Secretariat, Polish Embassy, 40 Queen Anne Street, London, W.1. (Tel.: Langham 3631.)

AMSTERDAM INTERNATIONAL AUTOMOBILE SHOW—
April 30–May 9, 1948. At R.A.I. Building. Apply to the Netherlands Association of the Bicycle and Automobile Industry, Amsterdam.

PARIS, INTERNATIONAL TRADE FAIR—
May 1–17, 1948. At Porte de Versailles, Paris. Apply to Miss E. Lambert, 14-15 Rugby Chambers, 2 Rugby Street, London, W.C.1. (Tel.: Chancery 6794.) Final date for space applications, December 31, 1947.

ZAGREB—INTERNATIONAL SAMPLE FAIR—
May 8–17, 1948. Apply to the Manager, Zagrebacki Velesajam, Savska Cesta, Zagreb, Yugoslavia, or the Commercial Attache, Yugoslav Embassy, 195 Queen's Gate, London, S.W.7. (Tel.: Kensington 3400.)

VALENCIA, INTERNATIONAL SAMPLE FAIR—
May 10–25, 1948. Apply to United Kingdom representative, Mr. R. H. Thornton, 8 Duke Street, London, S.W.1. (Tel.: Whitehall 6674.)

NEW YORK CITY, NATIONAL MARINE EXPOSITION—
* May 17–22, 1948. At Grand Central Palace. Apply to the Secretary, 17 Battery Place, New York, 4.

LILLE INTERNATIONAL COMMERCIAL FAIR—
May 29–June 13, 1948. Apply: Foire Commerciale and Internationale, 69 rue Faidherbe, Lille.

TORONTO, INTERNATIONAL FAIR—
May 31–June 12, 1948. Apply to the Canadian Government Exhibitions Officer, Canada House, Trafalgar Square, London, S.W.1. (Tel.: Whitehall 9741.) Final date for space applications past.

BARCELONA, INTERNATIONAL TRADE FAIR—
June 10–25, 1948. Apply to United Kingdom agent, Mr. Joaquin Bosch, 109 Whitton Road, Twickenham, Middx. (Telephone: Popesgrove 4822.)

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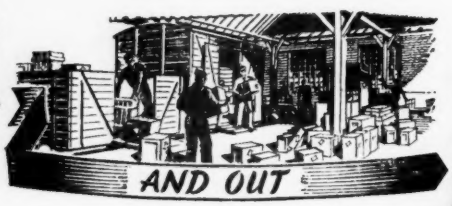

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Export Promotion.—35 Old Queen Street, London, S.W.1. (Victoria 9040.)
Finance.—New Oxford House, Bloomsbury Way, London, W.C.1. (Holborn 4311.)
German Division.—Millbank, London, S.W.1. (Whitehall 5140.) 31-32, 36-37 Bryanston Square, London, W.1. (Ambassador 2861.) Lansdowne House, Berkeley Square, London, W.1. (Grosvenor 4060.)
Import Licensing.—189 Regent Street, London, W.1. (Regent 4090.) 155 Regent Street, London, W.1. (Regent 7090.)
Industries and Manufactures (Division I).—Millbank, London, S.W.1. (Whitehall 5140.) 25 Victoria Street, London, S.W.1. (Abbey 3206.) 91 Victoria Street, London, S.W.1. (Abbey 7898.) 152 Gloucester Terrace, London, W.2. (Paddington 1242.)
Industries and Manufactures (Division II).—Horseferry House, Dean Ryle Street, London, S.W.1. (Victoria 6800.) Neville House, Page Street, London, S.W.1. (Whitehall 9040.)
Industries and Manufactures (General).—Millbank, London, S.W.1. (Whitehall 5140.)
Industries and Manufactures (Planning and Priorities).—Millbank, London, S.W.1. (Whitehall 5140.)
Information Division.—Millbank, London, S.W.1. (Whitehall 5140.)
Insurance and Companies.—Romney House, Tufton Street, London, S.W.1. (Abbey 3801.) Jersey Road, Osterley, Isleworth, Middlesex. (Southall 2494.) Government Buildings, Heyhouses Lane, Lytham St. Anne's. (St. Anne's 2300.)
Intelligence and Parliamentary Branch.—Millbank, London, S.W.1. (Whitehall 5140.)
Overseas Information.—3 Central Buildings, Matthew Parker Street, London, S.W.1. (Abbey 5678.)
Patent Office and Industrial Property.—25 Southampton Buildings, Chancery Lane, London, W.C.2. (Holborn 8721.) 51 Regent House, Cannon Street, Manchester, 4. (Blackfriars 1128.)
Production Efficiency Service.—Millbank, London, S.W.1. (Whitehall 5140.)
Raw Materials.—Millbank, London, S.W.1. (Whitehall 5140.)
Solicitor's.—Millbank, London, S.W.1. (Whitehall 5140.) 71-72 Grosvenor Street, London, W.1. (Grosvenor 4681.) (Including Ministry of Fuel and Power Branch, Dean Stanley Street, Millbank, London, S.W.1.) (Abbey 7000.)
Standards.—Chapter Street House, Chapter Street, Westminster, London, S.W.1. (Victoria 7032.)
Statistics.—Romney House, Tufton Street, London, S.W.1. (Whitehall 5140.) Chapter Street House, Chapter Street, London, S.W.1. (Victoria 7032.) Great Westminster House, Horseferry Road, London, S.W.1. (Victoria 3811.)
Tobacco Control.—Queen Anne's Chambers, 28 Broadway, London, S.W.1. (Whitehall 5140.)
Trading with the Enemy.—7 Crosby Square, London, E.C.3. (Avenue 5282.) (The Custodian of Enemy Property is at the above address.)
Export Credits Guarantee Department.—9 Clement's Lane, Lombard Street, London, E.C.4. (Mansion House 8771.) Branch Offices : London (2), Manchester, Bradford, Birmingham, Glasgow, Belfast and Sheffield.
Central Price Regulation Committee.—Queen Anne's Chambers, 41 Tothill Street, London, S.W.1. (Whitehall 7010.)
Local Price Regulation Committee.—23 Buckingham Gate, London, S.W.1. (Victoria 7503.)

Board of Trade Regional Export Officers

SINCE the President of the Board of Trade, announced the names and duties of Export Officers appointed to assist manufacturers and others interested in the export trade, the list has been revised.

The up-to-date list given below may be useful to manufacturers who wish to make or renew contact with these officers.

Northern (Cumberland, Durham, Northumberland, Westmorland and the North Riding of Yorkshire): Mr. K. Cargill, Clarendon House, Clayton Street West, Newcastle-n-Tyne. (Tel. Newcastle-on-Tyne 27550.)

East and West Ridings (The East and West Ridings of Yorkshire): Mr. P. E. H. Wilde, Pearl Chambers, East Parade, Leeds, 1. (Tel. Leeds 31761.)

North Midland (Derbyshire (except the High Peak District), Leicestershire, Lincolnshire, Northamptonshire (including the Soke of Peterborough), Nottinghamshire and Rutland) Mr. T. Storey, Government Buildings, Clifton Boulevard, Nottingham. (Tel. Nottingham 73013.)

Eastern (Bedfordshire, Cambridgeshire (including the Isle of Ely), Essex, Hertfordshire, Huntingdonshire, Norfolk and Suffolk, except such parts of Essex and Hertfordshire as are within No. 5 Region): Mr. B. F. Boothby, Shaftesbury Road, Brooklands Avenue, Cambridge. (Tel. Cambridge 56221.)

London and South Eastern (London (administrative county) Middlesex, Kent, Surrey and Sussex, and parts of Essex and Hertfordshire) : Mr. W. G. Graham-Palmer, 3 Central Buildings, Matthew Parker Street, London, S.W.1. (Tel. Abbey 5678.)

Southern (Berkshire, Buckinghamshire, Dorset, Hampshire (including the Isle of Wight) and Oxfordshire) : Mr. C. A. Solly, Marlborough House, Parkside Road, Reading, Berks. (Tel. Reading 60431.)

South Western (Cornwall (including the Isles of Scilly), Devon, Gloucestershire, Somerset and Wiltshire) : Mr. P. H. Smithers, 37 Julian Road, Sneyd Park, Bristol, 9. (Tel. Bristol 38446.)

Wales : Mr. G. N. Carey, Room 416, Imperial Buildings Mount Stuart Square, Cardiff. (Tel. Cardiff 5920.)

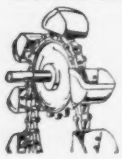
Midland (Herefordshire, Shropshire, Staffordshire, Warwickshire and Worcestershire) : Mr. W. R. Lindsay, O.M.I.L. Buildings, Great Charles Street, Birmingham, 3. (Tel. Birmingham Central 8231.)

North Western (Cheshire, Lancashire and the High Peak District of Derbyshire) : Mr. C. G. V. Wilkinson 77/79 Fountain Street, Manchester, (Tel. Manchester Central 5411.)

Scotland : Mr. C. R. Cowie, 95 Bothwell Street, Glasgow, C.2. (Tel. Glasgow Central 6981.)

BRITISH GOVERNMENT CONTRACTORS

These announcements are restricted to firms and companies on the lists of Contractors to H.M. Government Departments.



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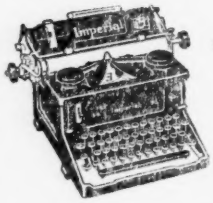

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